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Museum Management in a Time of Change: impacts of cultural policy on museums in Britain 1979–1997

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Centre for **Cultural Policy Studies**

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List of Abbreviations

ACE	Arts Council of England
ACGB	Arts Council of Great Britain
ADS	Art Development Strategy
AMC	Area Museum Council
CAS	Contemporary Art Society
CCT	Compulsory Competitive Tendering
CoRAA	Council of Regional Arts Associations
DCMS	Department for Culture, Media and Sport
DLO	Direct Labour Organisation
DNH	Department of National Heritage
ERDF	European Regional Development Fund
HETB	Heart of England Tourist Board
HLF	Heritage Lottery Fund
ICOM	International Council of Museums
MA	Museums Association (UK)
MGC	Museums and Galleries Commission
MTI	Museum Training Institute
NACF	National Arts Collection Fund
NAO	National Audit Office
NHMF	National Heritage Memorial Fund
OAL	Office of Arts and Libraries
PSA	Property Services Agency
RAA	Regional Arts Association
RAB	Regional Arts Board
V&A	Victoria and Albert Museum
WMA	West Midlands Arts Board
WMAMS	West Midlands Area Museum Service
WMRMC	West Midlands Regional Museums Council

Notes

Definitions

The subject of this paper is an area full of ambiguous terms. The following will apply throughout the paper unless otherwise stated.

1. Museums and (art) galleries: The word 'Museum' subsumes 'gallery'.
2. Museum: This paper follows the definition of the Museums Association in the UK. A museum is an "institution that collects, documents, preserves, exhibits and interprets material evidence and associated information for the public benefit". Museums in this definition includes galleries (Museums Association 1996, p352).
3. Director: The job title varies among museums. As will be explained in Chapter 1, it may well be 'Assistant Director' in local authority parlance. The person who is in charge of overall 'museum service' alone (ie not necessarily the director of a larger department, eg leisure services, in which museums are included) is referred to as Director.
4. Museum and museum service: 'Museum service' for a local authority includes running possibly more than one site and other non-building based services. In Part 2 case study is primarily, but not exclusively, focused on the main sites of the services. In principle, I use the term the 'Museum', for example, for the Birmingham Museum and Art Gallery where it is discussed as the site. However, I use it also to allude to the organisation which runs the museum service in Birmingham, depending upon the context, which should not be confusing in the text.
5. UK: The paper deals with museums in the United Kingdom, except where the explanation on funding and legal matters is mainly concerned with England.
6. Visitor and visit: Conceptually these are distinctive (Schuster 1993, p42): one visitor can make more than one visit. In research reports I refer to in Chapter 9, such a distinction is rarely found. Therefore, I use the terms in a loose way as they do. Visitor numbers are in many cases estimates only.
7. Arts, art, and culture: In general, I use 'arts' when performing arts are mentioned, and 'culture' for a larger context including them. 'Art' tends to appear when the visual arts

8. are the topic. However, different authors I quote may use these terms in different ways. For example, for Wolff (1993, cited in Chapter 9), 'art' is wide-ranging, including visual and performing arts and literature, which are discussed in a generic sense. In making reference to her and other works, I follow their usages. They should be clear in the context of the text.
8. Governing body: "A museum governing body is the principal body of individuals in which rests ultimate responsibility for policy and decisions affecting the government of the museum service" (Museums Association 1996, p352). For a local authority museum, this is the "full council of the authority" (Museums Association 1996, p352). Despite this constitutional definition, in practice, the council is sometimes seen as an external part of a local authority museum by the executive staff. Or it is seen as an external *and* internal part. Accordingly, I refer to the council in both ways. Which definition is employed should be clear in the context.

References

The following principles apply with regard to references.

1. Some of the materials consulted are undated. I make the best possible guess of the publication year and indicate with a question mark, for example, as (MGC 1995?), instead of (MGC undated). This is designed to show the context of the publication in relation to the subject matter concerned in the text.
2. For Part 2, sources of information are a number of unpublished documents and interviews, as are explained in the Research Methodology. As a rule, I make no specific reference to them, except where a direct quotation is made.
3. I sometimes refer to unpublished papers and circulars, for example, KMPG (1994).
4. Some of the articles from the Museums Journal, even authored ones, seem to have been entitled by the journal editor. Full details are given in the list of references at the end of this paper, but this convention should be borne in mind. Unauthored articles from the Journal are also included with full information, so that interested readers should be able to locate them.

Preface

This paper is the second project report under a Research Partnership between the University of Warwick and the West Midlands Arts Board (WMA). The objective of the scheme is to contribute to the understanding of cultural policy from a regional perspective. What this means in practice is that I am provided with a framework in which I carry out relatively small-scale research projects to address issues of regional cultural policy, with the help of the WMA. The views expressed in my research are however entirely my own. This research opportunity has been very exciting for me, since not much has been written on cultural policy in the English regions, while there are so many interesting topics awaiting investigation. Despite the primarily regional scope of the scheme, however, the first project paper has proved that the findings of research can also have national and international application, and I believe the same holds true for this paper.

I would like to note here that my approach to cultural policy study is a generalist one. I am not a museum specialist, unlike many of the academic commentators I quote in this paper. It has perhaps been bold of me to question and challenge some of their views. I hope however that my intrusion into this area—which seems to me a closely-knit, well-established circle of distinguished people from both academia and museum practice—makes a fresh contribution to the field, as well as to wider cultural policy research.

Another point about my being a generalist is related to the variety of the academic disciplines on which I base this work. In Part 3, literature is drawn from management, marketing, sociology, administrative science, aesthetics, cultural economics and cognitive psychology. It has not always been easy to introduce some of the interesting theories generated in their own disciplines, and apply them to the phenomenon I try to explain. A difficulty has been to keep jargons and technical terms to the minimum without distorting what the authors mean. I hope my interpretation has done justice both to the works I consult and to the area with which this study is concerned. On this matter, I would welcome any comment readers may wish to make.

Related to the above is the fact that I may frequently be using some business vocabulary in the paper. I am aware that many readers from museums would not be happy about this. I make an apology here, but some of the terms are used for want of a museum-specific language, and others for their explanatory, metaphorical or conceptualising effects.

I should also acknowledge here the omission of several interesting topics and perspectives from which to study museums. The questions relating to cultural representation, and the making and selling of the past are two of the most regrettable ones, which I wish could have been more fully incorporated into the discussion of museum management. In the limited space of this paper, where I need to manage a potentially huge topic of study in a reasonably-defined boundary, I can give only a cursory glance at these issues. Frustrated readers are encouraged to read the excellent books on these subjects, such as Lumley (ed)(1988), Vergo (ed)(1989) and more broadly McGuigan (1996).

Acknowledgements

The advantage of working in an under-documented field, of course, has a major disadvantage for research, which is the difficulty of data collection. As a result, I have repeatedly been indebted to a large number of people for their time and co-operation. First of all, I would like to thank my interviewees. In particular, the directors and officers of the four museums where I conducted case studies were so generous in giving time for my interviews, and providing in-house documents of various kinds. Some of my interviewees were people who had already left the organisations concerned, but kindly talked to me of their past experiences. Some interviews were conducted with the same people twice adding up to three to four hours of interview; others lasted as many hours in one go. I am deeply grateful to those who allowed that much time to me.

Oliver Bennett, Beverley Parker, Valerie Synmoie, Caroline Foxhall, Jane Arthur and Chris Bilton kindly read the draft and made helpful comments on it. Discussion with Heather Maitland was illuminating and informative about the state of the art in marketing. The views and any factual errors in this paper are however solely my responsibility.

I would also like to note my especial gratitude to Jackie Swancutt, and the staff at the West Midlands Regional Museums Council, whose friendliness and efficiency made my work productive and comfortable. They also did a lot of tedious copying for me upon my request. Henrietta Hopkins also helped in searching for materials I needed. Without the help of these people, this study would have been less informed.

In thinking about museum management, I personally reflected very much on how a university is managed, since education and culture are in similarly competitive situations while being under increasingly severe scrutiny. Referring to universities in order to exemplify the management of not-for-profit, service organisations which rely heavily on professionals for service delivery (such as museums and universities, as will be explained in Chapter 8) is, in fact, an approach often taken in the works I consulted. I feel extremely lucky for having had a personal experience of seeing good management in practice in the particular situation I have been working in. My colleague, Oliver Bennett, Director, Centre for the Study of Cultural Policy, and David Thomas, Chairman, School of Theatre Studies, University of Warwick, in which the Centre is located, may not be aware of my observation, but deserve my greatest thanks: they seem to embody the ‘master of paradox’ (see Chapter 11 for the meaning of this). Learning from my husband, Toru Yokoyama, in Tokyo over the telephone conversation about the changing scenes of management in the business world also gave me some useful hints as well as his usual encouragement for my work. It was an expensive lesson, but provided more than value for money.

Nobuko Kawashima

Autumn 1997

Executive Summary

This paper examines some of the major impacts of British cultural policy in the 1980s and 1990s, with particular reference to museum management. The paper identifies three major themes of cultural policy at national and local level during the period as the needs for (1) plural funding, (2) customer orientation and (3) management for efficiency and effectiveness, and examines their impacts on local authority museums.

The paper consists of three major parts and a concluding part as follows:

- the themes of government policy in culture reiterated through the decades, and environmental changes surrounding the museum sector in the UK (Part 1)
- a case study of museums owned and run by local authorities, which provides empirical findings on the subject. Three specific areas—income generation, public service orientation and strategic management—receive attention (Part 2)
- the theoretical analysis of issues in museum management (Part 3).

This report aims to contribute to the following research themes. Primary readership may be different for each:

- the context and issues in which the UK museum sector has been operating in the last few decades, as an introduction to the subject for those who are not yet familiar with it, and also for those who wish to reflect systematically on the changes they have known by experience (Part 1)
- a case study of management changes in the local authority museum sector, which may be of interest to those working in the sector, or to cultural policy makers who have a stake in museums (Part 2)
- a theorisation of museum management, aimed at museum managers and researchers, and cultural policy makers and researchers, both in the UK and beyond (Part 3)
- a study of museum marketing, its development, state of the art, issues and problems, for those particularly interested in marketing (Chapters 5, 7 and 9)
- a proposal of research topics in visitor studies for practical use (Chapter 9)
- a study of public service management, for those who wish to compare the experience of culture to other areas of public policy (Chapters 4, 6, 7 and 11).

The following are the main arguments which emerge in conclusion, drawing together the findings of individual chapters in this paper.

- Management has arisen as a pressing issue for museums across Britain during the late 1980s, and particularly in the 1990s for local authority museums. The background to it is complex, including external pressures and challenges and internal desires for change.
- The delivery of cultural policy does not normally take the form of legislation. In the British model, in particular, government prefers to shy away from direct involvement. This study identifies the ways in which government has communicated its emphasis on management to museums via: changing funding patterns, issuing directives through the quangos and delivering messages in official reports. The constraints on public funding of museums have in effect necessitated change in museum management.
- As to local authority museums, however, it has taken time for the pressing need to change management to emerge. It is in the 1990s that they have started fully to come to terms with plural funding, marketing and strategic management. This suggests that policy at central level, though implicitly targeting local organisations as well as national ones, has to go in a roundabout way to reach the former. Cultural organisations, depending upon governance type, size and location, possess different capacities to respond to environmental changes.
- Local authority museums are not well-equipped to become commercialised and marketised, or to handle the enterprise culture. They have however developed capital projects in recent years by seizing opportunities and critical resources. They may be more sensitive to political rather than commercial forces in that they are subjected to the local council's policy. For local authority museums, many of which do not charge for admission, marketing has not taken a firm root. Audience development to reach traditional non-visitors, which is a more orthodox and non-commercial embodiment of marketing philosophy, is making notable progress.
- Museums are full of contradictions, conflicts, dilemmas and paradoxes, which derive from their multiple goals, functions and roles to play. Their external and internal relationships are highly complicated. As a result, the standard model of strategic management, which is based on a view that organisations are rational entities and exist to attain stated goals, needs modification for the museum sector. Stakeholder analysis should at least be

incorporated into the procedure of strategic management as an integral part. Performance measurement, which is an essential part of strategic management, is not easy because of the difficulty in constructing meaningful indicators, and the practice can pose problems for museums.

- In order to develop customer-oriented management, it is urgent for museums to start to fill in the gaps in their understanding about visitors. The research agenda includes topics which are categorised into: (1) visitors' profile, (2) the pre-visit period, (3) visitors' experience during the visit and (4) the post-visit period. Interdisciplinary research with regard to visitors' experience during the visit is of particular importance. Some of the research topics that need to be explored by the museum sector are identified in this paper, together with existing theories, which will help define aspects of the 'experience' in detail.
- The basic model of strategic management—defining objectives, implementing plans to achieve them and monitoring progress—may be useful for beginners and as a foundation. For museum management at a more advanced level, however, mastering paradoxes, understanding various incongruencies and acquiring different sets of values seem to be the key.

The key findings of each chapter in Parts 1 to 3 are summarised in Chapter 10 of the Concluding Part.

Introduction

May of 1997 witnessed a historical landslide victory for the Labour Party in the General Election, bringing the Party back into government after a period of eighteen years in opposition. This is an interesting time for cultural policy research, because the change of government has made it all the more important to review what has been done during the Conservative administrations. Few people in the cultural sector, however, may be very sanguine about the future. In fact, the Conservative Party's reign of eighteen years has been long enough to institutionalise policy changes supported by the thinking of the so-called 'New Right' in many quarters of British public life.

It is unclear yet whether or not the Labour Party's policy will bring a favourable climate to the cultural sector and to the public who should be its beneficiaries. What is clear, however, is that British cultural policy from the 1980s up to the present is marked as a period of tremendous changes in the relationships among government, culture and the arts, and the market. According to McGuigan's (1996) labelling, the period from the mid-1960s to late 1970s was the era when the basis of cultural policy was "*social access*" (p54), which changed in the following years to "*value for money*, characterised by an increasingly pervasive *market reasoning* and *managerialist rhetoric*" (italics original, *ibid*). This can be paraphrased as an argument that the role of government in cultural policy has shifted from the collective provision of cultural and artistic services by the welfare state to the laissez-faire principle. While political rhetoric was changing, in practice, public funding for the arts and culture became tighter at the same time; consequently arts and cultural organisations have increasingly been exposed to market forces, which has affected their management.

True, anecdotes abound: we often hear stories of theatre closures, British artists' exodus abroad where they find less financial constraints, museums abandoning the free admission policy and so forth. And we see arts centres and museums furnished with a range of commercial outlets in operation, making the venues look like "cultural supermarkets" (Bennett, O 1996, p12). We receive personally-addressed letters from orchestras offering a 'two tickets for the price of one' (or something more sophisticated!) type of package. It is perhaps already a received wisdom that cultural organisations in recent years have adopted various approaches, techniques and skills of management to enable them to be financially viable.

However, as Bennett, O (1996, p12) admits, where he describes the general trend of the arts towards entrepreneurialism, there is a dearth of empirical study to document the impact of policy changes. He notes this lack of research particularly in relation to a programming policy of arts organisations aimed at maximising income. I would argue that there is a similar lack of research available which studies the extent and effects of policy changes in the area of management. Nor is there much research to conceptualise the implications of the changes. What is available is largely anecdotal and journalistic. Furthermore, we do not know very much about how cultural organisations have been coping with the problems caused by situational changes, when it comes to the cultural sector outside London.

This paper has been written to start to fill in the gaps by scrutinising the aforementioned conventional wisdom: the primary aim of the research is to examine the extent to which and in what ways cultural policy changes of the recent decades have affected management in cultural organisations. The research will be conducted through investigating the rise of management among museums, which is seen as “the most high profile aspect of museum activity at present” (Moore 1994, p1).

Thus, the present paper is a modest attempt at reviewing the era administered by the Conservative governments by an examination of one particular sub-sector in the field of arts and culture. In this sense, this is an exploratory study with an aim of documenting policy directions and their impacts on museum management. In doing so, however, this focus will result in theoretical and analytical discussion of museum management in general in the latter part of the paper.

To summarise, the primary objective of this paper is:

- To review a widely-held belief that the policy emphasis on entrepreneurialism has driven cultural organisations to acquire various management techniques in an empirical setting, and to document the details of the organisational changes, if any, which have taken place.

Through the research, the paper will also have the following aims:

- To identify the relationships between social, economic, technological and political contexts to which cultural management has been responding
- To shed light on the process and mechanism through which governmental priorities have been communicated to cultural organisations to bring about changes in their management
- To understand the context in which concepts in relation to management (eg marketing and strategic planning) and their model procedures have been introduced to cultural organisations, and to identify their responses to the concepts and the models

- To present policy implications of the changes in cultural management
- To contribute to the general understanding of organisation and management in the arts and culture.

Case Study

In achieving these objectives, local authority museums will serve as the focus of the study, and four of them will be examined in detail in the second part of the paper. Local authority museums are chosen for the case study, among many types of cultural organisations, for the following theoretical reasons.

1. Museums generally are established institutions of culture (Moore [ed] 1994, p.ix), sharing patterns of organisation and function. Thus, there has been a body of literature in museum studies on various subjects (if less on management *per se*), promoted by the growth of the sector in recent decades, which would facilitate and theoretically inform the present study.
2. Local authority museums can be assumed to be one of the latest to be marketised in the cultural sector due to their three attributes: (1) the principle of free admission, (2) the old ‘civilising mission’ of cultural policy (Bennett, O 1995, pp207-210) which they embodied (ie one of the original purposes of public museums when they were established in the Victorian era was to educate and civilise those whom the ruling class saw as ‘ignorant, unmannered’ people), and (3) governmental ownership. Hence, it would be interesting to see to what extent they have acquired an ‘enterprise culture’.
3. Local authority museums have been influenced by the changes in cultural policy at the national level aimed at the whole museums sector. They have also been subject to cultural policy at the local level, which in turn is affected by central government’s policy in public sector management. Thus, they are at the junction of different routes in cultural policy administration, which may or may not converge in the end. To examine the influences on local authority museums would allow us to comprehend and disentangle the complicated web of national and local government policies affecting culture.
4. Local authority museums have not been examined very much in cultural policy research. Empirical research on them is of value in its own right.

There are also practical considerations for the choice:

1. Despite the diversity of local authority museums, as will be explained in Chapter 1, they share certain similarities which would enable comparison and generalisation in some aspects for the purposes of the paper.
2. Also, despite the diversity and individualistic nature of the museum sector (in terms of size, discipline, governance and management), museums are to a large extent similar in terms of their functions. The Nationals may have a strong emphasis on scholarship, whereas the Independents may be more focused on recreation or community identity. However, what they do—collect, document, conserve and exhibit—is more or less the same. Internationally as well, the functions are essentially the same, allowing a high degree of international co-operation on projects. This is illustrated in the level of activity seen in organisations such as the International Council of Museums (ICOM) serving the interests of the international museum community rather than being an honorary figurehead. Discussion at international conferences on museums seems to encounter few serious problems deriving from national differences. As such, the case studies can be expected to have broader applicability far beyond the local authority museums under examination.

As is implied in the above, therefore, the paper on the one hand provides an empirical study on a modest scale, to examine the impact of the changes in cultural policy during the 1980s to the 1990s. I will refer to larger-scale studies conducted elsewhere to contextualise the case study within the local authority museums sector wherever possible. Towards the end of the paper, on the other hand, it attempts to go beyond the case study, aspiring to the presentation of theories on museum management, which I hope will be widely applicable.

This aspiration may sound contradictory to the first statement on the modest scale of this paper. It may also seem too ambitious to jump to generalisations of the UK museum sector. Paradoxically, however, in view of the unevenness of museum provision by local authorities, the diversity of the museum sector, and notwithstanding the functional universality of the organisations, this has been the most feasible and appropriate approach for this research project. I have found it necessary to discuss in generic terms shared characteristics of museums and problems deriving from them for management, in order to better understand the case study.

To put it in a different way, local authority museums stay in focus throughout, but in the analytical section, other types of museums are also brought in. In this sense, the theoretical argument I will make generally on museums in Part 3 is not, strictly speaking, an extrapolation from the case study. It will be rather an attempt to claw the museums examined in the second part of the paper back into a wider context, and make sense of what has been happening to the limited number of organisations I investigate.

Organisation of the Paper

Signposting is lavishly provided in this paper to help readers see where my discussion is heading and to enable each Part to be a self-contained reading. There is some overlapping between Organisation of the Paper and introductions to Parts and Chapters. Readers who follow my writing in the given order may wish to skip some of these sections.

The paper consists of three major parts and a concluding part. Discussion will evolve through the parts, from context, case study, analysis to summary. The Concluding Part is relatively long, but I hope the inclusion of a detailed summary of findings (Chapter 10) will prove to be useful rather than tiresomely lengthy.

Part 1 will outline contexts and issues for the museum sector, with particular reference to local authority museums. Chapter 1 will lay out basic statistical information, history and the legal framework regarding local authority museums for readers who are not particularly familiar with these. Those who are already informed can go directly to 1.4 of this chapter, where I pick up the issues of governance and the mixed nature of collections, and point out their implications for management. The implications which I discuss will reappear in the following chapters.

Chapter 2 will outline the changes in the environment in which the museum sector is located. The approach will be to start with the macro level and focus down to place local authority museums under the microscope, so as to bridge Part 1 to Part 2 where the case study is described. At the micro level, the changing nature of the market (ie the growth on the supply side and demographic changes among consumers) will be mentioned. Then cultural policy changes at the central level and other changes specific to the local level will be outlined. Through these, three themes will emerge as the forces of change for local authority museums as well as museums in Britain in general. They are:

- the emphasis on income generation
- the importance of customer-oriented management
- the introduction of strategic management and performance measurement to pursue economy, and to ensure efficiency and effectiveness.

Part 2 will study four museums in the West Midlands region, owned and run by local authorities. Chapter 3 will provide a basic description of each, paying particular attention to its distinctiveness in comparison to the rest. The profiles will by no means be comprehensive

but kept minimal. This, however, is hoped to be sufficient as background information to later discussions. Chapters 4 to 6 will individually follow the three themes identified in Chapter 2.

Chapter 4 will begin by examining the aspect of income generation at the museums in relation to retailing and catering. It will find that they have expanded operation in these areas in recent years, but are not yet well-equipped to exploit commercial opportunities.

Chapter 5 will deal with the issue of customer orientation, or marketing. This is an area where performing arts organisations have generally developed to a great extent in recent years, even if only out of financial necessity. In contrast, the chapter will find local authority museums are laggards in this respect. Some of the practical obstacles to the development of marketing aimed at increasing visitor numbers are described. It then, however, will find growth in different versions of customer orientation: customer care, improved facilities and audience development activities. Examples will be drawn from the case study to illustrate these trends.

Chapter 6 will examine the extent to which strategic management, of which performance measurement is a part, is used in practice in the Museums. It will find that museum operation has become more systematic and sophisticated in recent years, with a number of systems and plans in place. Nonetheless, successful developments have been made through spotting available resources and grabbing opportunities, rather than by a rigid attachment to the original goals.

Part 3 will widen the scope again, departing from the findings of the case study to a discussion of museum management in general. It will try to identify management problems which are fundamental and shared by many museums, including those managed by local authorities. Analysis will focus on 'the museum' as an organisation. For those who are interested in museums generally, this part of the paper could be read in isolation from the rest.

Chapter 7 will set out the tone for the following chapters. A museum's distinctive features as an organisation, such as permanency, its multiple goals and constituencies, and the museum's internal human resources will be analysed in the respective subsections. The chapter will discuss how these inherent features contribute to the complexity and difficulty of museum management.

Chapter 8 will further the argument of Chapter 5, by probing the idea of strategic management as advocated for the museum sector and the issue of performance measurement. Drawing upon the organisational analysis given in Chapter 7, the chapter will argue that the standard model of strategic management alone does not work in the museum context and will suggest an alternative approach. Performance measurement is seen as the key, but an anathema, to management of public services such as museum provision. Practical, theoretical and behavioural problems related to evaluation will be discussed. Finally, the chapter will introduce different models of organisational effectiveness evaluation, developed in organisation theory literature. This will shed fresh light on how we approach strategic management.

Chapter 9 will elaborate the issue of customer orientation examined in Chapter 5. Considering the lack of information on visitors to be one of the problems in the development of customer-oriented management, the chapter will develop a range of research topics which need to be tackled if museum management is to incorporate marketing philosophy. The research themes proposed will not be limited to conventional information used for marketing, such as visitor profile and motives for visiting. They will also encompass studies on how people perceive and understand artistic and cultural objects, analysis of which is necessary for effective audience development. This chapter could be read as a literature review despite its contribution to the rest of the paper. This chapter is the one I hope will be of especial use for museum marketers, education officers and curators.

In the Concluding Part, Chapter 10 will provide a summary of Parts 1 to 3, chapter by chapter. Chapter 11 will take an overview of the major findings and discuss the implications which permeate different chapters. They will suggest this study's contribution to cultural policy research and raise issues for further exploration.

Research Methodology

Since cultural policy at the regional level is generally under-documented, and also in the light of the limited scale of this study, the case study approach seems to be appropriate. It is preferred, furthermore, because the objectives of this paper (listed in the Introduction) include (a) to describe contextual conditions as well as the phenomenon examined in the study, and (b) to provide illustrative materials of empirical evidence (see Yin 1993, p.xi; 1994, pp1-17).

In researching this local authority museums are chosen. The rationale for the choice is provided in the Introduction. The selection of four specific museums is explained in Chapter 3.

Archival materials as well as published information were collected from various sources, including those produced by support organisations in the museum sector both directly from them and from specialist libraries. For the four Museums in the case study, published information is limited. Thus, unpublished documents (eg policy papers of individual organisations and their reports prepared for the council meetings) were of importance. Recent emphasis on strategic management in cultural policy (as explained fully in Chapter 2) has made museums produce a huge quantity of papers. Counter-productive though the work may have been for the Museums, the research has benefited from the various documents they have generated in recent years. In parallel, personal interviews were conducted with relevant managers and officers from the four organisations. In contrast, the background and contextual materials for the whole museum sector is, as an area in cultural policy research, substantive, probably due to its size. Conference proceedings and seminar papers, handbooks, pamphlets, journal articles, books, and annual reports of relevant organisations were consulted.

Interviews were conducted by the author between September 1996 and April 1997, more widely than only with the case studied organisations. Broadly, the interviewees can be categorised as follows:

1. people from the four Museums—museum ‘directors’ (see Note 3), other officers and curators, current or previous
2. people from funding bodies or service organisations for museums—the Museums and Galleries Commission, the West Midlands Regional Museums Council, the Museums

Association, the West Midlands Arts Board, the Arts Council of England, and the then Department of National Heritage (renamed Department for Culture, Media and Sport)

3. people who belong to neither of the above categories, but have long experience and expertise related to museum management.

The names of the individuals are provided in Appendix A. All the interviews were semi-structured and tape-recorded. Normally, an interview ran for 1 -1.5 hours, but some of them took over 3 hours. With key individuals two sessions were held on separate dates. In total, 27 individuals were interviewed, with whom 32 sessions took place.

Part 1: Context and Issues

The objective of Part 1 is to sketch out the context in which the museum sector has been made aware of the need to change itself, and point out the key issues which have emerged for the sector to respond to. The period the part will be discussing is roughly through the 1980s onwards, with particular emphasis on the late 1980s and the 1990s. Within the museum sector special emphasis is given to local authority museums, or the museum services provided by local government in Britain. It is important to understand that the museum sector has been affected by a variety of environmental and internal changes, as well as by government policy in the arts and culture since 1979 which has made change imperative. In other words, this part of the paper will try to understand policy pressures on the museum sector in a broader context, by looking at situational factors—economic and social—as well.

Thus, Part 1, insofar as it is related to local authority museums, will pave the way for Part 2. At the same time, in keeping an eye on the wider context, it will serve as a useful foundation for the analysis to be undertaken in Part 3. Chapter 1 will outline basic features of local authority museums in Britain, preceded by an overview of the whole museum sector. Given the variety of policy and practice regarding museum services provided by the authorities, it is almost impossible to generalise about them. Nor is it necessary to be comprehensive, considering the objectives of this paper outlined in the Introduction. The areas included in the description—history and legal framework—and the points made in these areas, are those which seem to have implications for the management of local authority museums.

Chapter 2 will place local authority museums in social, economic and political contexts. Firstly, the chapter will discuss the changes in the circumstances surrounding the museum sector, such as the growth of the sector and the leisure industry, and demographic changes. Central government's policy in reforming the public sector will be mentioned in parallel with the changes in cultural policy with reference to museums. The reforms of local government will also be elaborated in terms of their impacts on cultural policy at the local level.

Chapter 1. Local Authority Museums

Introduction

This chapter aims to describe basic features of local authority museums and to locate them in a wider context of the museum community. Before depicting local authority museums in particular, it will be helpful to present a brief overview of the whole museum sector of which they are a part.

The museum sector is relatively large, within the field of culture and the arts. It consists of approximately 2,500 museums, employing the equivalent of about 25,000 full-time equivalent staff, in receipt of public money worth over £400 million from various sources, and attracting an estimated 100 million visits per year (Museums Association 1997). It is one of the major parts, along with libraries, media and the arts, of the non-commercial cultural sector in Britain. It also plays a major role in tourism and leisure markets.

It is a sector diverse in terms of collection types, size (measured in terms of collection, staff, building and geographic remit), and ownership. A museum may be ‘national’ by being directly funded by the Department for Culture, Media and Sport (DCMS, renamed in July 1997 from the Department of National Heritage [DNH]),¹ or ‘independent’, meaning it is constituted privately and may or may not receive public grants. Regimental and university collections are also part of the sector, whose funding originates from departments of central government other than the DNH. Museums of any category are eligible for support by the Museums and Galleries Commission (MGC) as long as they are ‘registered’ by meeting certain criteria. The division of registered museums is set out in Table 1.1 (overleaf).

¹ The DCMS however directly funds a few ‘non-national’ museums (eg the Horniman Museum) as well for historical reasons. It must be noted also that there are other departments of the central government which fund museums, such as the Ministry of Defence.

Table 1.1 Registered Museums in Britain

<i>Ownership</i>	<i>Number</i>	<i>%</i>
Local authority	730	44
Independent	661	39
Armed Services	112	7
University	88	5
National	37	2
National Trust	27	2
English Heritage	21	1
Total	1676*	100

Source: DOMUS (Digest of Museum Statistics), Museums and Galleries Commission (MGC 1997a)

Note: *Museums with full, provisional or deferred registration status only. As of 19 February 1997.

If we include those which have not registered, it is estimated that the number of independent museums shoots up to 1,100, local authority museums to 800, and the whole sector to 2,500 (MGC 1992, pp13-18). As can be seen in both sets of statistics, local authority museums are a significant component of the sector in number. This large picture is now followed by specific characteristics of local authority museums.

Local authority museums occupy a distinctive, if not unique, place in the British cultural policy framework for being owned and directly run by (local) government. In contrast, the National Museums, along with other so-called national organisations in the performing arts (eg the Royal National Theatre), and the majority of non-commercial cultural organisations in Britain are, irrespective of their income sources, private institutions with their own trustees, and have charitable status.

While the local governmental ownership has a profound implication for its management, there are other features to which we need to pay attention in order to have a clear picture of local authority museums, particularly in a wider context of the museum sector. The following sections will briefly describe their origin, development, legal framework, size, collection and funding (for more comprehensive information, see MGC [1991]). Subsequent to this overall description, aspects of governance and collection are highlighted; these will have implications for the analysis of museum management in the following chapters.

1.1 History

Like many other museums in the UK, the majority of local authority museums originate from collections of private individuals and learned societies, donated for the benefit of the public. The collections were supported further by gifts of funds and buildings, made by philanthropists (MGC 1991, pp36-37). The motives of local authorities in assuming trusteeship for the collections on offer and establishing museums open to the public varied, as was the case with what came to be known as the National Museums. In many cases municipal museums were created to symbolise civic pride. In the great Victorian foundations, equally prominent was the civilising effect of beautiful objects particularly on the working class people (Silber 1988, p183; Pearson 1982, pp27-30; see also Minihan 1977, pp85-95; Bennett, T 1995). Also the advantage of providing access to well-designed objects for local craftsmen was often emphasised, with the aim of developing their aesthetic sense and improving the quality of manufacturing (Pearson 1982, p29). These educational and commercial benefits were especially highlighted in the museums of South Kensington, London, established in 1852 to follow the Great Exhibition (Minihan 1977, pp112-117). Because of these aims many museums were open free of charge. The doors were even open in the evenings at least on certain days of the week, so that the working class people could attend (Kavanagh 1994, p12). Exactly the same argument is found in Birmingham in the 1850s, where it was thought necessary to improve the aesthetic 'taste' of small crafts entrepreneurs, leading to the need to establish a public art gallery (Davies 1985, pp8-13). The 1890s and 1900s saw the first boom in the museum sector, doubling the total number of museums and mapping out the basic structure of museum provision in Britain. As a result, most major cities and towns possessed a museum by 1920 with a total of 424, out of which 148 were run by local authorities (counted by Teather, cited by Kavanagh 1994, p8).

Whereas the National Museums expanded collections, individually specialising in areas such as natural history, fine art and archaeology, local authority museums thereafter tended to accumulate mixed collections of various types either by conscious efforts or by coincidence. In many cases not only collections but also additional buildings were acquired. Thus, one authority is often in charge of several 'branch museums' in addition to the main site. The addition of branch museums was one of the components of the second museum boom of the 1970s. Available data show that there were 267 local authority museums in 1928 (Miers 1928, p14), rising up to about 400 in ten years (Markham 1938, p22). The total number had then stayed stable until 1973 when 468 were identified (Department of Education and

Science 1973). They then increased at an explosive rate to some 800 by 1991 (MGC 1991). Table 1.2 in Appendix B traces the history of this growth.

1.2 Legal Framework

The development of legislation concerning local authorities' involvement in the arts and culture has a long and complicated history. Museum provision is an area which appeared in local authorities' cultural policy at an early stage. In England and Wales local authorities were first empowered to operate museums in 1845, the empowerment being extended by subsequent legislation in 1919. The Public Libraries and Museums Act of 1964 further extended the legal powers of local authority museums in the provision of museums and libraries. Through these pieces of legislation, local authorities have been permitted discretionary power in the provision of museum services, including grant-aid towards museums run by independent bodies. Under the Local Government Act of 1972 museums in England and Wales became a concurrent function which could be exercised by both Counties and Districts. One section of this 1972 Act confers the general powers on Town, Parish and Community Councils to operate or support museums.

Although these pieces of legislation have empowered local authorities of all tiers to be engaged in museum service provision, the service remains discretionary, as opposed to mandatory. It is this nature of the service that has made its status within councils weak and financially difficult. The level of service provision is not reflected in the formula that determines central government's Revenue Support Grants to local government, from which revenue expenditure to a museum service largely derives.

1.3 Contemporary Framework

For the above historical and legal reasons, the provision of museum services by local authorities is uneven and diverse in terms of size and type of collection across the country. Nonetheless, local authorities as a whole control a fairly large share of the total museum sector. In monetary terms, the total current spending by local authorities on museums is estimated to be £137 million for 1996/7 (DNH 1997, p165), while the comparable expenditure by the DNH on the National Museums is £214 million (*ibid*, p22).² It can be

² This includes funding to the MGC of £9.1 million and to a few non-national museums of £11.3 million (1996/7).

safely said that many of the local authority museums at their main sites still do not charge for admission,³ reflecting the original idealism of the last century. Regardless of charging policy, however, local councils' funding has been the major income source for museums. Exceptions are York and Bath, which are popular tourist destinations in Britain, where city museums make net profits from admission charges (Audit Commission 1991, p25). Most of them, however, heavily rely on funding from local councils for revenue, and to a minor extent on various sources for specific projects and purchase, including: the Area Museum Councils (AMCs), the MGC (eg Purchase Grant Fund for the Regions), the National Heritage Memorial Fund (NHMF), the National Arts Collection Fund (NACF), Contemporary Art Society (CAS), other charitable trusts and arts funding bodies (eg the Arts Council and the Regional Arts Boards).

Due to the historical origins described above, collections are often maintained in Victorian, grand, purpose-built buildings, which enjoy a superb location at the heart of towns and cities. The existence of multi-disciplinary collections under one roof⁴⁴ has often given the organisations the name of 'City Museum and Art Gallery'. The aggregate of running this and small-scale 'branch museums' added later is often called the 'museum(s) service' in local authority parlance. For example, Birmingham has as many as nine sites, including the main one. In some cases several local councils jointly run a large-scale museum service as one unity. The North of England Open Museum at Beamish is a good example of this pattern. Also important to note is that local authorities provide support to independent museums located in their jurisdictions, by providing grants and making curatorial and other technical expertise available to them. Such non-financial support is a major feature in the MGC Registration scheme. (2.2 of Chapter 2 will provide more information on the scheme). The scheme requires museums without professionally qualified curators (often small and independent institutions) to ensure regular access to curatorial advisors elsewhere, the majority of whom have been drawn from the local authority museums sector (MGC 1991, p41).

Reflecting the discretionary nature of service provision, the departmental structure within the councils has been another thorny issue for local authority museums, as it affects the museums' status and access to the policy-making process. A typical pattern in the 1960s for large museums was the formation of a separate department, with the director as Chief Officer

³ The Museums Association (1997) quotes DOMUS by the MGC (as of 12.11.1996), and states "just under half of registered museums (including the Independents and the Nationals) impose admission charges". The Audit Commission (1994, p4) reports that 50% of local authority museums charge at some of their sites. This however represents a significant increase from the figure of 20% in 1991.

⁴ In contrast, the Nationals and the Independents are likely to be responsible for one specific type of collection.

reporting to a discrete committee in the council (Standing Commission on Museums and Galleries 1963, p63). Since the local government reorganisation of the mid-1970s, many of the museums' departments have been merged into larger units, such as a Leisure Department. Thus, the status of the museum director has often been lowered from Chief Officer to Assistant Director, which has effectively distanced museums from the decision-making table. The current reorganisation of local government in England and Wales has been reinforcing this trend. The rationale for the amalgamation of different departments has been to make savings and maintain coherence among public services of similar nature such as libraries, education, sport and museums. However, the view that museums have lost out in the bureaucracy is generally strong (see, for example, MGC 1991, pp19-24), since they are subsumed in the Leisure Departments among other services.

1.4 Important features

The above has given a descriptive account of local authority museums in general terms. What is distinctive about them in comparison to the rest of the sector deserves particular attention, that is, their governance and the mixed nature of their collections. I will briefly mention some of the implications of these attributes for management, but leave the task of further analysis to later chapters.

1.4.1 Governance

A singular feature of a local authority museum is that its governing body, the council, consisting of politicians, is the paymaster itself. At the Nationals and the Independents, governance and funding are clearly separate. The lack of separation means that management tends to depend on the extent to which elected members of the council understand and are sympathetic to the service. Unlike trustees of the Nationals and the Independents, however, local authority museums have no influence whatsoever over who is going to sit on the board. An advantage is that local councillors, by definition, can bring the museum and the local community close to each other. However, it is hard to expect from the members resources such as expertise, contacts and experience in cultural as well as management areas.

Being part of local government has two implications for management. Firstly, at the philosophical level, local authority museums are rarely allowed to present their legitimacy solely for the sake of culture and knowledge. The rationale for museum provision relies heavily upon the benefits—educational, social and economic—which are offered to the tax

payers or the general public. Accountability to the local community needs to be the priority. As was mentioned in relation to the departmental structure, museum provision may well be integrated into or co-ordinated with other council services for this reason.

Secondly, at the practical level, museums must follow the laws, rules, regulations, structures, policies and conventions pertaining to the larger bureaucracy. As a result, they have relatively little flexibility. Human resources management is a good example. A museum has no discretionary power to take on or dismiss staff. Such decisions have to be made within the council's structure, with little regard to the needs of the museum. A positive side to bureaucracy, from a consumer's point of view, is that local authority museums tend to be open and accountable.

1.4.2 Mixed Collections

The Nationals and the Independents are most likely to focus on one discipline or one area as far as collection is concerned. In contrast, many local authority museums at their main sites have, as has been explained in the historical context, an eclectic collection, which is wide-ranging in discipline. Different sites may be disciplinary-focused such as science centres, or restored country houses with fine and decorative arts. Taken together as a 'museum service', however, disciplines represented are diverse. This has three implications.

Firstly, curators, limited in number in each museum, often have to deal with a variety of objects and collections in which they may or may not be specialists. At the Nationals, in contrast, given the vast numbers of objects from different parts of the world and dating from the prehistoric period to today, curators are assigned, according to their specialist knowledge, to cater to specific sets of collection. As a result, curators of the two sub-sectors tend to remain disparate, and there is very little movement of curatorial staff between them.

Secondly, however, curators in larger local authority museums do have specialist areas and develop networks within their subject areas. An art curator would be interested to know of fine art collections of other museums, rather than a natural history collection at his or her own museum. This tends to reinforce departmental divisions within a single organisation. Some attempts have been made to tackle these divisions in recent years.

Thirdly, from a cultural policy research point of view, local authority museums are interestingly located at the cross-roads of the complicated, diverse funding systems for

culture in Britain. Broadly speaking, museums and libraries on the one hand and the arts on the other have been revenue-funded by two separate systems both at the national and local levels. When it comes to visual arts, however, they do overlap, if only marginally. Local authority museums which have visual arts collections, present contemporary art exhibitions, and work for gallery education or community outreach are thereby eligible for support by the 'arts funding system' (ie the Arts Council and the RABs). As will be mentioned in later chapters, having relationships with arts funding bodies through their visual arts activities has been a strength in times of change for some of the local authority museums.

Conclusion

The museum sector is a diverse and individualistic one by nature. Museums owned and run by local authorities have been acknowledged to be the key in the network of museum provision in Britain. They are "the spokes of the wheel" (MGC 1992, p16), while the National Museums are "the hub of the UK museum system" (ibid). The sector's governance, mixed nature of collections and funding structure have been identified as particular interests in the present study of museums from a cultural policy perspective.

Chapter 2. Environmental Changes and Need for Management

Introduction

Never has the issue of management received so much attention among local authority museums, or in the whole museum sector, as during the late 1980s up until today. Museums, it has been said, have been ‘administrated’ but now need to be ‘managed’. Management is now a necessity in order to change proactively in adapting to dramatic environmental changes (Moore 1994, pp1-2).

This chapter elaborates this argument and provides a contextual account of the environmental changes surrounding the museum community, with particular reference to local authority museums. The changes intersect and have complex impacts on the museums. For the purposes of analysis, societal changes at the macro level are firstly mentioned in 2.1. At this level, another important factor is the supply side of the market, namely, the size and the composition of the museum sector itself. Secondly, at the intermediate level of analysis, political factors involving central and local government are examined (2.2). Finally, at the micro level, local authorities’ cultural policy in particular relation to museum service provision is explained in general terms (2.3).

2.1 ‘Market’ Changes

One of the major changes museums have seen in relation to their operation is that of the supply side in the ‘museum visiting market’. The growth of the sector during the 1970s and 1980s has been remarkable (Policy Studies Institute 1990, p49): the Museums Association (1997) estimates there are approximately 2,500 museums and galleries, a significant number when compared with under 900 in 1962 (MGC 1992, p9). The growth owes much to the mushrooming of independent museums. Many of them were established and are still run by enthusiastic individuals and voluntary associations to preserve craft of the past, and local and industrial history. The development of these museums epitomises what Hewison (1987) describes as the rise of the ‘heritage industry’. There are also independent museums of large scale, which draw substantial numbers of visitors each year. Admission charges and other visitor spend constitute a vital source of income to those large Independents. Due to this income structure, it is often said that they are market-oriented: responsive to customers’

needs, and imaginative in their presentation of displays and information (Greene 1983, p25). Their expansion has influenced museum culture, making subsidised museums aware of the need to behave in a similar way (Silber 1988, p183).

A related trend is the sophistication of presentation in the quasi-museum, visitor attraction industry. The use of various techniques to entertain visitors, such as moving vehicles, sound effects and actors in period costume, are increasingly employed by these heritage centres. It is said that they have had an impact on museums' thinking by demonstrating techniques for attracting and entertaining visitors. They have also exemplified how lively historical and cultural accounts can be presented to visitors (Hooper-Greenhill 1994, pp30-34). Demands for good amenities and customer care of high standard at museums and galleries have been enhanced by an upsurge of consumerism in commercial and public services in general. The demands are still growing, as people's expectations tend to keep rising (Middleton 1990, pp32-33).

At the other end of the exchange in the market, the composition of consumers are also changing. Demography is a major factor affecting social trends, as it determines the costs of certain service areas such as education and health on the one hand, and the growth rate of the national wealth on the other hand. In demographic terms, museum provision is not particularly age-related in that sense, but the demographic profile of the population does have an impact on the nation's pattern of museum visiting.

Museums have been made conscious of the changing nature of demography and its implications for the services they provide. This awareness is greater than ever before: previously museums had only limited knowledge of their 'markets' (Davies 1994a, pp8-10). A comprehensive report on strategic analysis of the market potential for the whole sector was drawn up only in 1994 (Davies 1994a, see its Foreword). It is only in recent years that research has started to throw light upon the perceptions and attitudes which non-visitors have towards the cultural institutions of museums (Hooper-Greenhill 1994, p19). The issue of cultural diversity, or the awareness of a multi-cultural society, is relatively new to museums. Research as well as good practice in this area is slowly emerging (Hooper-Greenhill 1997, p5). At the time of writing, there is a major study on the subject conducted by the MGC.

As far as the consumer market is concerned, the picture appears favourable to museums in many respects. For example, the ageing population is interpreted to mean an increase in active, semi-elderly people (aged 50+) who would generally retire earlier and have higher

levels of education than previous generations. It is believed (eg Anderson 1997) that museums will be an ideal place for their life-long learning. In terms of life-style, overall, leisure time has been increasing, and more people own cars, which provides an opportunity for museums (Davies 1994a, pp20-23). Museums and galleries are the third most popular type of arts and cultural events and activities, only preceded by stately homes and cinemas (ACGB 1991), and draw a wide range of age groups and socio-economic strata (Davies 1994a, pp53-57).

However, other commentators urge caution, calling for a more prudent interpretation of the statistics. The growth in leisure time and the leisure suppliers can mean that museums face tough competition for people's time from other leisure and entertainment services: notably historic houses and castles, and theme parks which often include a range of shops, restaurants and entertainment facilities. Also, while it is evident that in general more people will have more leisure time, it is necessary to pay attention to the availability of spare time in relation to occupational status (Tyrrell 1987; Figure 3.6 in Davies 1994a, p23): the data in Davies (1994a, p23) shows that in 1993 full-time workers have had less free time available than in 1985/6. Given that the core visitor group—aged 25-54 (35-44 age group in particular) (Davies 1994a, p51-55)—is more likely to be in employment, this should be a worrying factor for visitor trends. An American consultant at a UK conference drew attention to the experience in the US that “as leisure time continues to evaporate” for current museum visitors, they would be looking for a ‘crispy’ exhibition that would not require extensive walking, time and attention but provide a high quality and rewarding experience in smaller time bites (Museums Journal 1994a, p21). Even the increase in those aged 50+ in the year 2000 who have ample leisure time has been pointed out as an issue by a UK consultant (Middleton 1991): the generation will have grown up enjoying greater affluence than their parents and with higher educational attainment, and will tend to demand a higher level of provision in many senses and be more articulate about their needs.

2.2 Cultural Policy at National Level

Recent decades in Britain have seen large-scale reforms in public sector management and public services provision. Literature on these topics abounds, and has slightly different ways of summarising the themes of the reforms. Flynn (1993) for example identifies four strands: (1) the emphasis on market mechanisms to be used wherever possible, (2) promotion of competition and more choice for consumers, (3) the pursuit of individualism and individual

choice, rather than collective decision-making and (4) state provision to be kept to a minimum. In parallel with these, 'managerialism' has been introduced to public administration in the civil service and public service management (eg Pollitt 1990).

However, unlike the major service areas studied in the above literature, such as education and health, cultural policy consists of little legislation. Also, due to the 'arm's length' principle of the British government in this area, it has repeatedly been confirmed that government has little statutory control over cultural organisations. The role of government is to encourage and support the development of the cultural sector, but a distance is kept, at least in theory. In the case of the museum sector as well, although the National Museums and local authority museums are directly funded by central and local governments respectively, the principle largely applies. Even in the latest major policy review by the DNH, culminating in a document entitled 'Treasures in Trust' (DNH 1996a), the Government's role is defined as to "provide a policy framework within which individual museums and other bodies can operate", and the Government "does not propose a more centrally determined and administered strategy" (pp5-6). The Museums and Galleries Commission (MGC), a quango (quasi-autonomous, non-governmental organisation), is the body designated to set a framework and promote standards, if not to provide funding. As to local authority museums, since it is not a mandatory service, central government has little, if any, direct means of interference and influence.¹

A degree of national regulation and influence does, however, exist. The Registration scheme of the MGC, introduced in 1988, is the most notable example, in enforcing certain requirements for all 'museums'. This is a voluntary scheme, but registration, based on meeting certain criteria, is a requirement in order for any museum to receive grants and subsidised services from the MGC and the Area Museum Councils (AMCs), its regional partners. The main requirements of the Registration scheme are in the areas of constitution, finance, collection management, public services, and access to professional curatorial advice. The two major objectives of this scheme are to promote minimum standards to be satisfied by museums of all kinds and all ownership types, and to enable registered museums to demonstrate their worthiness for public and private support. In effect, the scheme has helped improve museum operation practice, which was not always seen as excellent. In 1996, the DNH decided to create a new category of non-national museums designated as having pre-eminent collections in England, and has asked the MGC to implement this policy, called the

¹ However, there are pieces of government legislation, which are not specifically designed for museums but which have affected them, for example, on equal opportunities, education reform, and the introduction of compulsory competitive tendering.

‘Designation’ scheme. (Details of this will follow in 3.1 of Chapter 3). This scheme is supposed to enhance prestige, but offers no guarantee of DCMS funding.

Despite these differences between cultural policy and other areas of public policy, parallel arguments and initiatives introduced by the Conservative governments can be found in cultural policy, and broadly summarised in four themes. They include: (1) plural funding, (2) emphasis on consumers’ choice and rights, (3) the promotion of management practices imported from the business sector and (4) the pursuit of economy, efficiency and effectiveness by subsidised organisations through these measures. These issues will be considered in more detail below.

2.2.1 Plural Funding

The first theme of changes in cultural policy reflects the Conservative governments’ determination to contain public expenditure, including expenditure on the arts and culture. The importance of plural funding has been repeatedly emphasised to the clients of the Arts Council and the then Regional Arts Associations (RAAs, restructured and renamed as Regional Arts Boards [RABs]) (eg Luce 1986, 1987, 1988, the then Minister for the Arts). Museums likewise have been told not to expect extra cash from central government to meet their “constantly growing” (Wilding 1985a, p195) demands.² Richard Luce (1987) stated in a public speech in 1987 that arts organisations should get rid of their “welfare state mentality”: a very contentious expression as it not only insulted the arts altogether but it also abused the concept of the welfare state.³ The alternative funds, it has been argued, include corporate sponsorship, profits from auxiliary, commercial activities, and more income generated from box office. ‘Independence’ has been the key in the rhetoric to support the promotion of plural funding. For example, Tim Renton, the then Minister to the Arts, expressed the idea in an interview:

The greater degree you are dependent on central government or on local authority funding, the greater degree to which you lose independence.

(Wright 1992, p17)

The Office of Arts and Libraries (OAL)⁴⁴ had already made arrangements for operating the National Museums more flexible than in the past. This was done for example by shifting their status from parliamentary vote to grant-in-aid in 1988/9, so as to provide incentives for

² Richard Wilding was the then Head of the Office of Arts and Libraries.

³ If one was to use the concept of the Welfare State, it would be more appropriate to relate it to the citizen’s right to culture. Luce seems to refer to an arts organisations’ right, a claim he regarded as excessive and illegitimate.

⁴ The OAL was merged into the DNH in 1992.

the Museums to earn income through trading activities and seeking out donations and sponsorship. At the same time, responsibilities for building maintenance and development were handed over from the government's Property Services Agency (PSA) to the National Museums. They may now seek external contractors and consultants on property advice. The National Museums, seeing their budgets in decline, started vigorously to solicit corporate sponsorship and private donations, to expand the operation of shops and cafés and to charge for admission. They also took on new administrative functions, which were delegated from departments of central government.

2.2.2 Customer Orientation

The second emphasis has been levelled at service recipients, which some of the cultural managers may see as a positive aspect of the whole Conservative governments' ethos. Although the origin of the philosophy may lie in its distrust of the professionals, the point made now is that service provision should be more centred on consumers rather than determined by service providers' needs. 'In Search of Excellence' (Peters and Waterman 1982), the world-wide million-seller management book of recent years, has been influential for this orientation both in the private and public sectors. As an example of this ethos, the National Audit Office (NAO) examined aspects of public service within the National Museums (NAO 1993).

Marketing has been one of the areas most explicitly addressed in this respect by cultural policy at central level. Luce himself initiated the OAL's Marketing Scheme in 1987 to encourage the practice of marketing in the arts and cultural sector. This Ministerial intervention was a somewhat unusual departure from the 'arm's length' principle in British cultural policy. Among performing arts organisations, marketing had quickly spread as an essential management tool and practice, which was helped by the Arts Council's support and also by the increased affordability of computer technology in processing information on arts attenders.

As to the museum sector, as will be discussed in Chapter 5, the development of marketing has been very slow in comparison. Through the OAL's Arts Marketing Scheme, it quickly became apparent that "many museums had too poor a grasp of what marketing could offer them" (MGC 1992?, p4). Consequently, the Minister provided the museum sector alone with a total budget of about £425,000 for a period of four years, dedicated to stimulating the development of marketing skills (MGC 1992?). As far as some of the National and large

Independent museums are concerned specifically, however, the late 1980s to the early 1990s have seen remarkable developments. The British Museum (Natural History) changed its name to the colloquial Natural History Museum and created a corporate logo. The Victoria and Albert Museum (V&A) launched a large-scale poster campaign, devised by Saatchi and Saatchi. Its main objective was to change the museum's 'Victorian' image and to target young, relatively 'upmarket' adults who were in general culturally active but had never visited the V&A. The slogan that read "An ace caff with quite a nice museum attached" and the way the museum items were featured in the posters caused public controversy. Yet (or because of the controversy) the attendance figures for the period when the campaign ran reportedly increased significantly from the equivalent period during the previous year (Robertson 1988, p201).

Furthermore, much has been done in order to accommodate the emphasis on customer orientation in the museum sector. The MGC developed guidelines on 'customer care' in the mid-1990s (MGC 1995?). Prior to that, some National institutions had already sent staff to a training course on customer care offered by the Disney Corporation, in order to learn from the leisure industry (NAO 1993; MGC 1995?). Some museums have also centralised all 'front of house' services who deal with the public, and given training to staff in customer care and knowledge of the museums' exhibitions, so that they are able to reply to general enquiries from the public on the spot.

2.2.3 Management

The third area of reform is the emphasis on 'business-like' management. Negotiations with corporate sponsors were expected to provide a means of transmitting business practice and culture into the arts and cultural sector. More active measures were initiated to teach the arts how to do business. The Incentive Funding Scheme of the Arts Council which ran from 1988/89 to 1990/91 is one of the most notable examples. It provided awards as seed funding for three-year business plans, through which an increase in self-generated income was to be achieved. For the National Museums, the OAL started in 1988 to require all National Museums to submit five-year corporate plans.

Sector-wide, the MGC and the AMCs have been encouraging the development of management through various publications and guidance. The most extensive of these is the MGC's Registration scheme (already mentioned in 2.2 of this chapter), whereby museums must demonstrate certain standards of management in collection care and other areas in order

to register. In the second phase of the scheme, more rigorous assessments are being made. One of the requirements now included is for museums to have a 'Mission Statement' which is the basis of a Forward Plan.⁵

2.2.4 Efficiency and Effectiveness—Performance Measurement

The fourth theme of cultural policy reforms is in a way all-inclusive. Cultural sector management has been told to “show that they are using the funds provided by taxpayers and private donors as efficiently and effectively as possible” (Renton 1991). Derek Rayner, an industrial champion, who was brought into central government to advise on promoting efficiency in government, began to examine the management of cultural organisations pleading with the government for extra cash. The reports, which were part of the ‘Rayner scrutinies’ programme (Priestly 1983; Burrett 1982), were not dismissive of the organisations, and Burrett (1982) was even largely supportive. Yet the reports failed to remove government’s sceptical view regarding epidemic inefficiency in the cultural sector.

Through the 1990s, the OAL and the DNH have sought to strengthen their ability to scrutinise the National Museums and ensure ‘value for money’. In 1991, Coopers & Lybrand completed an OAL commissioned report, suggesting a comprehensive set of performance indicators, to meet the needs of the OAL and of the National institutions (OAL 1991). 1994 saw a further work by another consultancy firm (KPMG 1994), which was intended to “develop a common framework for approaching indicators” (p5), thus taking into account the diversity among the National Museums and the problems raised in the fierce debates since the previous report. Currently, each National Museum shows individually-selected performance indicators in the corporate plan to be submitted to the DNH, which may or may not be used internally for evaluation by the DNH. Given the variety in size, collection type, and activities among them, the DNH has not been able to employ any common framework of performance indicators which would allow inter-organisational comparison among the museums it directly funds. However, it has been said that the department is still searching for such a framework (Museums Journal 1993a, p28).

2.2.5 Other Developments

Central government’s policies in other areas such as education, disability and equal opportunities need to be noted as having implications for museum service provision. The

⁵ It was decided, after debate, that a Forward Plan was not to be included as a mandatory part of the Registration.

introduction of the National Curriculum is said to be an opportunity for museums, as it encourages pupils learning through seeing authentic objects. A drawback is that schools' visiting patterns are becoming curriculum-led. The reduction of the budgets over which Local Education Authorities have control has also been seen as a problem for educational activities of museums.

The latest development in the museum environment is the advent of National Lottery funding in 1994. Among the four large categories of funding, museums may be eligible for the Millennium Fund, the Heritage Lottery Fund (HLF) distributed by the National Heritage Memorial Lottery Fund (NHMF) and the National Arts Lottery Fund. As far as performing and visual arts are concerned, the Arts Lottery Fund has led to a monumental excitement (and concern), as the total value of awards made per year is almost equal to the total sum of the Arts Council of England's (ACE) funding for the arts. The other two funds by the distribution rule have the same amount of money available, which in theory should have had a large impact on museums.

Curiously, however, it seems few speakers at conferences or writers in journals have talked of this opportunity with the same degree of enthusiasm as seen in the arts sector. One of the reasons is the complexity in applying for the HLF, the elaborate and lengthy assessment involved, and the difficulty of getting an award at the end of the day. As a result, only 34% of the money allocated to the HLF was awarded in the first year (November 1994 to December 1995), in comparison with 93% of the equivalent from the Arts Lottery Fund (DNH 1996b, p48). The sheer volume of money available from the HLF is, however, not negligible; the relative lack of enthusiasm about this opportunity seems to have implications for the analysis of museum management, which will be explored later.

2.3 Local Authorities and Cultural Policy

Cultural policy of local authorities has been embedded in the web of central government's reforms in the public sector in general, and changes in cultural policy in particular. As such, themes parallel to what has been described above permeate cultural policy at local level, together with the implications of central government policy for the museum sector at national level, have relevance to local authority museums. Therefore, like the Nationals, they have been encouraged to seek opportunities to generate income wherever possible, to introduce

systematic management so as to improve efficiency and effectiveness of their operation, while making the service more relevant to the general public.

For local authority museums, a clear external pressure came firstly from the Audit Commission. Its 1991 report 'The Road to Wigan Pier? Managing Local Authority Museums and Art Galleries' (Audit Commission 1991) pointed out an overall lack of scientific, modern management within the sector. The Local Government Act of 1992 has required the Audit Commission to list indicators of performance for the public services provided by local authorities on which every authority in England and Wales is obliged to report annually (Audit Commission 1992?, p2). Museums and galleries were excluded from the service areas to be compared across authorities in the Citizen's Charter Direction in 1993 and 1996, but the Commission is reported not to have given up the possibility of including the service in the future (Museums Journal 1996, p8).

Another form of pressure came from the regulatory and funding quangos such as the MGC and the AMCs. The implication of the MGC Registration scheme for museum management have already been mentioned (in 2.2 and 2.2.3 in this chapter). The MGC supported the publication of a book in 1991 (Ambrose and Runyard [eds] 1991) in order to encourage well-structured, systematic approaches to management. The same year saw the report of a working party at the MGC, entitled 'Local Authorities and Museums' (MGC 1991), which covered a broad range of issues converging into the need for management.

On top of these trends specific to museums, central government's constraints on local government in general need to be mentioned, since they have had particular implications for cultural policy at local level. They are four-fold: (1) financial constraint and inflexibility imposed through various measures by central government, (2) the change in local taxation, or the birth of the community charge regime, (3) the introduction and extension of Compulsory Competitive Tendering (CCT) and (4) the reorganisation of local government in England and Wales.

Financial Constraint

The cultural policy of local authorities traditionally tends to fall within discretionary service expenditure,⁶ which may make it vulnerable to financial constraints. Although there may be an argument that budgets for the arts and culture have never been ample or sufficient, there is

⁶ However, a minor part comes from mandatory service budgets such as education, and increasingly from non-service areas such as economic development.

evidence, at least for the last five years or so, to suggest that financial climate has become a particularly difficult one for cultural provision by local authorities (Centre for Leisure and Tourism Studies 1996?; Boylan 1991, 1992, 1993a). The position however varies greatly from one authority to another. For example, Derbyshire County Council projected a 42.4% cut in cash terms for 1991/2 from the previous year's budget, whereas a 36.3% cash increase at Perth (largely for a new museum) was reported (Boylan 1991). Despite the variety Boylan has repeatedly found an unfavourable financial climate for local authority museums. The 1993/4 approved budgets, compared to 1992/3, saw, on average, staff cut by 2.1%, opening hours down by 1.7%, purchase funds down by 11%, and education services down by 11.8% (Boylan 1993a). They, together with anecdotal information, lend weight to a widely accepted view that local authority museums have been suffering from financial problems.

Community Charge

The MGC has researched the impact of the community charge on local authority museums already (KPMG 1990). The main points made are firstly the need to improve accountability, and secondly to respond to customers' demand and expectation that they provide value for money.

CCT

The third point is related to CCT. Museums and galleries have not been included among the services which must be put out to CCT, but part of their work has been affected, such as cleaning of the building, grounds maintenance, refuse collection and catering. Changes in catering will be fully discussed in Chapter 4.

Local Government Reorganisation

I have discussed elsewhere (Kawashima 1997) the issue of local government reorganisation and its impact on local cultural policy. Summary of the key points relevant to museums from my discussion would identify the following concerns. The first area of concern is the trusteeship of collections which belong to the disappearing authorities. The second is a possible decrease in assistance provided by large local authority museums to independent ones in the neighbourhood, and an effective reduction in budgets, particularly for those in large, metropolitan areas.

It is not, however, that local authorities were simply reactive and subject to change according to central government's directions; some developments originated from within the museums themselves. In many local councils, particularly those controlled by the Labour Party,

reforms have been made by changing traditional departmental structures and integrating different services, with an aim of rendering the service more responsive to citizens' needs. Devolving budgets and controls from the centre to the places closer to the service provision points is another such reform. Restructuring has had a notable impact on museums; the budget devolution has resulted in a need for financial management in-house at the museums.

Another area of local initiatives relevant to local museums is the rise of urban cultural policy. This is another topic I have discussed extensively, suggesting its implication for cultural organisations (Kawashima 1997). Museums have been, indeed, one of the beneficiaries in the whole movement, as they have been seen as a significant contributor to tourism. Because museums are building-based organisations, they can identify capital projects which are eligible for grants. This aspect has been useful for them to benefit from public grants such as the European Regional Development Fund (ERDF) and the Single Regeneration Budget, with the local authorities' support.

Conclusion

Taken all together, three broad themes that have been emphasised in government policy can be singled out in relation to the cultural sector:

1. the importance of income generation
2. tailoring service to the needs of the customer
3. a 'business-like' approach to management, or strategic management through corporate planning, while bearing in mind the importance of the 'three-Es'—economy, efficiency and effectiveness.

In perceiving these trends in conjunction with the societal changes described earlier, local authority museums have begun to feel acutely the need to change themselves. In the increasingly complex and turbulent environment in which they operate, management has come to be seen as the key to success. Although management in specific areas such as collection has long existed, the emerging imperative has been to be more strategic, corporate, managerial and conscious about accountability; museums now have to establish a broad view over different functions and roles of the organisation and set long-term goals and plans to which individual areas and actions are subject. Under such corporate strategies, at the same time, museums are required to employ managerial skills and techniques to juggle plural sources of income, to harness the changing nature of the workforce according to

organisational objectives, and to place the philosophy of public accountability at the heart of their operation.

These three themes, identified in environmental changes and to be tackled by a new museum management, provide the structure for organising the following chapters in Part 2. In practice, they very much overlap and reinforce each other. For example, the concept of marketing can be related both to the second issue of customer orientation and also the first issue of income generation as well. For the purposes of analysis, however, this paper will discuss each theme separately. Chapter 4 will focus on self-earned income, Chapter 5 on customer-oriented service, and Chapter 6 on the aspect of strategic planning and management.

Part 2: Local Authority Museums in Transition?

Part 1 has described the environmental changes—economic, social, political and cultural—to which museums have been exposed, with particular reference to the organisations run by local authorities. Three strands of emphasis which have been imposed upon local authority museums have been identified. They are in the areas of (1) income generation, (2) customer orientation and (3) strategic management. Part 2 will look at each of them in more detail in an empirical setting. The objective is to examine the extent to which local authority museums have been changed by these external pressures and by an internal urge to address newly emerging issues in the three areas.

Part 2 will draw upon a case study of four museums run by local authorities in the West Midlands. The context and basic features of the four organisations are described in Chapter 3. It must be remembered that local authorities' cultural policies are diverse and their museum services do not lend themselves to easy generalisation. Hence the four Museums are by no means intended to represent the totality of local authority museums, not to mention the whole museum sector. They are expected, however, to illustrate individual situations against the background of the overall trends described earlier. In order to provide a more balanced overview, however, large-scale, often quantitative, research surveys and reports on local authority museums will be mentioned as appropriate.

Chapter 4 will examine the advent of the 'enterprise culture' in the four Museums. Particular focus will be on retail and catering. It will argue that profit-making from these commercial activities has been modest, and will provide some of the reasons for the limited success. Chapter 5 will examine the principle of customer orientation. The chapter will discuss how the Museums generally have become more user-friendly and concerned with the public service aspect of museum operation. It will, however, find that 'marketing'—the definition of which will be a matter for later discussion—has been under-developed and has even diminished in recent years. The chapter will provide practical and obvious reasons for this diminution, as opposed to theoretical and structural issues that deter the development of the practice. The latter issues will form a topic in Part 3. Finally, Chapter 6 will examine the extent to which strategic management has taken root in museum management. Particular focus will be on the introduction of Forward Planning and Performance Indicators. The chapter will argue that the introduction of these management practices has had only a minor impact on the museums' direction at strategic level. The Museums have been developing, rather, in far more dynamic, opportunistic and sometimes un-planned ways.

Chapter 3. Case Study—Four Museums in the West Midlands

Introduction

Before proceeding to the following chapters where the three themes will be examined, this chapter provides a basic description of the four museum services and their main museums: Birmingham Museum and Art Gallery, Stoke-on-Trent City Museum and Art Gallery, Wolverhampton Art Gallery and Museum, and Walsall Museum and Art Gallery. The terms of ‘Museums’ and the ‘museum services’ however will be used interchangeably (see Note 4). Table 3.1 (overleaf) summarises basic statistics related to them.

These four Museums have been chosen, because they rank amongst the largest within the local authority museum sector in the West Midlands region. This is roughly measured in terms of annual expenditure, visitor numbers and the number of sites a museum service is responsible for. The collection’s status of “national importance” (assessed by the West Midlands Area Museum Service [appendices in WMAMS 1996]) and the length of the museum’s existence are also the key criteria. Walsall is specially included, despite being relatively small, since it has one of the most important art collections as the other three do. The inclusion is also due to a consideration given to its developmental character as will be explained in 3.5 of this chapter.

The chosen museums share the major features of local authority museums introduced in Chapter 1, which are not universal but representative of municipal museums in major cities and towns. While they share certain features, however, they do have differences amongst themselves. For example, the council’s net expenditure for the service in Birmingham is over ten times that in Walsall. Stoke and Wolverhampton seem close to each other in a number of respects, except for a difference in public subsidy. Walsall’s population is not very different from that of Stoke and Wolverhampton, but it has by far the smallest visitor figures. It is, nonetheless, renowned for its innovative approach to audience development and community involvement. It is therefore expected that overall similarities of the four Museums, seen from a sector-wide perspective, will allow a case study of them as an aggregate, while some differences among them will provide examples of different experiences.

Table 3.1 Four Museum Services in the Case Study

	<i>Birmingham</i>	<i>Stoke-on-Trent</i>	<i>Wolverhampton</i>	<i>Walsall</i>
Date Founded*	1885	1835	1884	1892
Population of City	1 million+	250,000	245,000	270,000
Number of Sites	9	4	4	4
Net Expenditure**	£6.2 million (1995/6)	£2 million (1996/7)	£1 million (1996/7)	£ 0.6 million (1997/8)
Attendance Figures	1 million (1996)	200,000 (1994)	161,000 (1996)	32,200 (1996)
Arts Council Funding	NA	ADS 1985/6-1994/5	ADS and Sunrise 1985/6 to present	ADS and Sunrise 1991/2 to present
Designation	Designated	Designated	NA	NA

Note: * main museum only, ** for all museums in the service

3.1 Context for the Four Museums

Before describing the museum services in detail, it will be useful to place them in the regional and national context and briefly mention a few schemes of national scale which have special relevance to them.

The West Midlands region has a mix of museums, ranging from major local authority institutions, popular Independents such as the Shakespeare's Birthplace and the Ironbridge Gorge Museum to university and regimental museums, with different types of collections. A total of 120 of museums attract over 7.5 million visits every year, making the region the second largest generator of leisure day trips after London (WMAMS 1996). Nonetheless, as far as the frequency of museum visiting by resident population is concerned, it has the lowest level of any region in England.

Economically, the region has suffered from the decline of manufacturing industries over the decades, as in many other areas in Britain. Most areas of the region have been designated as an Objective 2 Area of the European Regional Development Fund (ERDF), which is one of the European Union's Structural Funds. The Fund supports capital development projects primarily to regenerate regional economy, but it has benefited many cultural projects and the Museums in the region, as will be seen in the following chapters. At the time of writing, too, a project funded by the ERDF is being jointly organised by the West Midlands Regional Museums Council (WMRMC) and the Heart of England Tourist Board (HETB). The objective of the project is to improve the public face of museums in the region, by aiming to

increase attendance figures and visitor spend in museums. Audits have been taking place at participating museums, including the four Museums, to assess the current state of public services and recommend areas for development. The recommendations may lead to funding to improve activities and facilities of public services.

The investment from which the four Museums have benefited does not come only for economic development purposes, but also for regional development of the arts, funded by the Arts Council since the mid-1980s. This development strategy was spelt out in the document entitled 'the Glory of the Garden' (Arts Council of Great Britain [ACGB] 1984). In response to the long-standing criticism that the Arts Council's funding was disproportionately concentrated on London (eg Hutchison 1982), the strategy was to make a contribution to the arts in the regions for ten years so as to redress the balance. Within the visual arts, major regional museums and galleries were chosen as "existing public galleries throughout the strategic areas to develop their facilities and exploit their expertise and resources to maximum benefit" (ACGB 1984, p13). Through this Art Development Strategy (ADS), substantial grants were made available to support staffing and various projects, related to the presentation of contemporary art.

The City Museum and Art Gallery of Stoke-on-Trent and Wolverhampton Art Gallery and Museum were chosen to be the clients of the scheme. Walsall Museum and Art Gallery was also selected at a later stage in the programme. At the time of writing, the ten years of the Glory of the Garden scheme is being reviewed. Irrespective of the forthcoming assessment, it seems that it was seen as successful at least when it came to an end, since an extension of the scheme was made. The new programme, called the Sunrise Scheme of the Arts Council of England, has been in operation since 1995/6, though it is much more modest in scale than its predecessor. Competitive bidding was invited from 22 museums and art galleries for 6 awards. Wolverhampton and Walsall have been among the six clients of this new programme.

The last scheme to mention is not directly related to funding, but to prestige and recognition, which is known as the Designation scheme. The DNH in the review of museum policy (mentioned in 2.2, Chapter 2) asked the MGC to identify up to 30 non-national museums which hold pre-eminent collections of more than local or regional importance (DNH 1996a). The MGC and its advisors drew up the criteria against which to measure a museum's eligibility for Designation and assessed applications accordingly. In June 1997, the first list of pre-eminent museums was announced to include 26 museum bodies. Birmingham and

Stoke-on-Trent have been awarded the 'designated' status. The second round of the scheme is expected to designate a maximum of 50 museums.

3.2 Birmingham

Birmingham is the second largest city in Britain, with a population of over one million. Its museum service is also one of the largest in the local authority museums sector, with the net expenditure from the council amounting to £6.2 million (1995/6). The city's main Museum and Art Gallery was opened in 1885. Compared to other major industrial cities in Britain, the establishment of the Museum was relatively late, but it quickly caught up. It is located in a magnificent Victorian building, at the heart of the city centre close to the town hall. In addition, it has eight sites: the Museum of Science and Industry, six branch museums and the Joseph Chamberlain Memorial Library. Two of them were established in the 1990s. The main Museum and Art Gallery has an adjacent exhibition hall, called the Gas Hall, opened in 1993.

The whole service attracts approximately 1 million visits per annum, and the main Museum and Art Gallery ranked the tenth amongst the most visited museums and galleries in the UK (quoted in NAO 1993, p21). Many visitors are local people, but about half come from beyond the Birmingham boundary.

The collection ranges from fine and applied arts, antiquities, natural history, science, ethnography to social history. Among the differing collections, one of the most renowned is its pre-Raphaelite paintings, which the first curator/director actively accumulated through his over forty years in office. In respect of its fine and decorative art collections and science collections, the service has recently been awarded the status of national importance by the Designation scheme of the MGC.

The Museum's governing body is the City Council. The committee structure responsible for the museum service has gone through a number of changes. In the 1960s, there was the Museums Committee, which was replaced by the Libraries and Museums Committee, and by the Leisure Services Committee in the early 1970s. The Director had remained, however, as Chief Officer, reporting directly to the committee. The separate departmental status of the museums, which had existed since its inception in the last century, was finally terminated in 1994. Since then, major changes have occurred in the committee and departmental

structures. The museum service has become one of the areas that the newly-created, large Department of Leisure and Community Services is responsible for. The post of Director was changed to Assistant Director in the council's staff structure. In turn, the museum service itself has changed its organisational structure since 1995 through the new museum Director's efforts in streamlining the organisational hierarchy.

In recent years, the traditional structure of disciplinary departments has been abolished. The current structure is designed to be 'flatter', and reflects functional divisions such as curation and public services. Under the (Assistant) Director (who is responsible for the whole museum service, see Note 3), there are only three senior positions: Head of Curatorial Services, Head of Exhibitions and Museums Services, and Head of Community Museums. This structure is intended to respond effectively to local communities and to the increasingly commercial environment in which the service now operates.

Like many authorities, Birmingham has been squeezing its budgets in recent years, and this accounts in part for the restructuring of the museum service, as outlined above.

Being in the second largest city in Britain, the main Museum has had an identity dilemma: on the one hand it is strongly identified with the public life of the city, and on the other hand it aspires to a more outward, 'international' outlook. The emphasis has oscillated between the two orientations throughout its history, until the 1980s when, in concert with the city's overall positioning, the ambition was to be 'European' rather than the Second City of Britain. In recent years, while the museum service has been awarded Designation for the collections of national and international pre-eminence in it, an increasing emphasis has also been placed upon the service's relevance to the community of Birmingham. Social history has been pushed upwards on the museums' agenda, and the role of branch museums (renamed community museums) has been acknowledged as going beyond the history of restored country houses. These museums are now seen to be important linkage points with the local communities in which they are located.

3.3 Stoke-on-Trent

Stoke-on-Trent was created by an administrative amalgamation of six towns in 1910 and is located in North Staffordshire. Its population is nearly a quarter of a million. The area has been known for the history of its potteries, and still hosts a large number of well-established

ceramics manufacturers such as Wedgwood. As such, a large number of factory shops and visitor centres, in addition to the museums the city runs, are scattered through the large area, which enjoys between 1.7 and 1.9 million visitors per year (1994). Tourism is thus taken seriously by the Council. The City Museum and Art Gallery itself attracts approximately 200,000 visits per year. 75% of them are local residents, but the Museum is also popular among American and Japanese tourists.

The origin of the City Museum and Art Gallery dates back to 1835, when the Pottery Mechanics Institution announced its intention to create a museum which would be dedicated to 'the intellectual and moral advancement of the working classes of this neighbourhood'. While the collection was rapidly accumulated at the main site, other sites have been developed in recent years, and the service now consists of the main Museum and three sites. The current building is the first post-war museum built by a local authority, and is located near the town hall of Hanley. Since then, extensions have been made, including a major one in 1979.

The collection at the main Museum is a mix of fine and decorative arts, natural history, archaeology and community history. It is best known for its ceramics collection, consisting of 40,000 pieces, which has been praised as the finest and most comprehensive collection of British ceramics in the world. Built on this strength, the whole service received Designation in June 1997.

The governing body is the City Council. Unlike many other local authority museums in Britain, the reporting structure had retained the traditional model of local authority museums (ie a small, discrete department of museums reporting to a Museums, Arts and Heritage Committee) until April 1997. The transition of Stoke-on-Trent to a unitary authority in the current round of local government reorganisation has created a larger Leisure and Cultural Services Department. Museums are now a part of the 'Cultural Services' division in the Department, along with Parks, Libraries, and Leisure and Sport divisions. A former director of the museums has climbed the ladder of bureaucracy and been appointed to head the large Department. This again is unusual, since many of the Leisure Departments in the country have non-arts background directors.

The net expenditure of the Council for the whole service is over £2 million (1996/7). As with other local authority museums, funding is increasingly stringent in the 1990s. There was an uplift in the mid-1980s, thanks to the Arts Council's policy of increasing funding for regional

arts organisations. Stoke-on-Trent was one of the 'development strategy clients' of the ADS, receiving, on average, a grant of £30,000 to £40,000 per annum from 1985/6. This funding has enabled some exhibition programmes and the creation of three posts: one Gallery Technician and two Exhibitions Officers. The funding of these posts has been picked up by the Council, in line with the scheme's intention to encourage greater commitment by local authorities. The remits of the three posts are no longer confined to the visual arts collection.

3.4 Wolverhampton

Wolverhampton is a medium-sized city north of Birmingham with a population of about 245,000. The museum service is comprised of four parts: the main Museum, two branch museums and the Arts in the Community Team. The main Museum originates from 1884 and is situated in the middle of the city centre. Although it has a mixed collection, it is particularly strong in visual arts, and the main site is called the Art Gallery and Museum. The main Museum was visited by 161,000 people in 1996, about 80% of them being local. Relatively speaking, it is heavily used by local people. For example, research has shown that over 90% of all visitors had visited at least twice in a 12 month period.

The museum service is located in the Arts and Entertainment division of the Leisure Services Department of the Metropolitan Borough Council of Wolverhampton. The net expenditure of the Council for all the museums is over £1 million (1996/7).

Typical of municipal museums of this size, it was only in the late 1960s that the appointment of a professional curator was made.¹ This marked the starting point in the development of a fully-fledged museum and gallery service. Notable in this service is its contemporary arts collection. This feature owes much to the decision made in the early 1970s on collecting policy. The Museum claims to be the only organisation in the West Midlands region which actively collects and permanently displays contemporary art.

Like Stoke, the Museum has benefited from the Glory of the Garden funding, which created the positions of Education and Marketing/Publicity Officers, and a number of contemporary art exhibitions, events and live art performances. As was noted, it has managed to extend this funding beyond the ten year period of the ADS; it has successfully won an award for a further

¹ Librarians were often in charge of museum collections. See 7.2, Chapter 7, for more details.

three year funding under the Sunrise Scheme of the Arts Council of England (ACE) from 1995/6. This £15,000 fund per year has led to a post of Exhibition Officer, an internship for a trainee art curator, and specialist advisors on broadening audiences. In 1992, furthermore, Wolverhampton was selected to enter into a three-year partnership with the Contemporary Art Society and the Arts Council for the purchase of contemporary art. Another recent development is a curator internship, started in 1996/7 for a two year period, supported by the West Midlands Arts. This intern is expected to develop exhibitions to cater for Asian, Caribbean and African communities.

3.5 Walsall

Walsall has the smallest museum of the four in visitor numbers and budgets. The museums are located in a culturally-diverse, economically-challenged town, with a population of 270,000, near Birmingham. The main Museum was opened to the public in 1892. The Mayor remarked in his opening speech, “We will see that the manners of the people will become softer and less uncouth”, mirroring the typical Victorian idea of cultural conversion. The main site has always been above the library, next to the town hall. The museum service runs two sites, and cares for other miscellaneous collections. Two of the museums were opened in the 1990s.

The annual net expenditure for all the sites by the Council is about £550,000 (1997/8). The main Museum is visited by over 32,000 people (1996), who are primarily local. An interesting feature about attendance is that most users are young, under 25 years old (Cox with Singh 1997, p159).

Its strength and the turning point in its history lie in the Garman Ryan Collection, donated to the museum in 1974, with the aim of providing a “bright light in the Black country” (Kathleen Garman, one of the benefactors). This is a collection of modern and contemporary works of Western European art, as well as those from Ancient Greece and Rome, China, and Africa. Particularly represented is a variety of works by Epstein, the husband of Kathleen Garman.

The museum service has been part of Cultural Services in the Department of Leisure and Community Services. The creation of the department in 1988 has enhanced the importance of targeting the whole service at the local community. Funding for the museum service

increased as well. This emphasis on being “first and foremost people-focused” (Forward Plan, Walsall Museum and Art Gallery, 1991) emphasis is repeatedly confirmed in various documents as being of paramount importance. During 1996, this direction has been further advanced by a political upheaval of the Council, which led to a reconfiguration of the hierarchy structure. As a result, education and leisure services have been amalgamated under the same management line, if not a department as such, and operational responsibilities have been divided into ‘service areas’ with the intention of making service delivery closer to the customers.

In recent years the Museum has emerged as one of the pioneers in contemporary art exhibition and in its audience development work since the arrival of a new director in 1989. Like Stoke and Wolverhampton, Walsall was one of the regional galleries funded by the ADS of the Arts Council. Support started later than for the other two in 1991/2 and ended in 1994/5. This funding had enabled the creation of two positions: Senior Exhibitions Officer and Interpretation Assistant. The increased staff and new directorship have resulted in a number of significant developments.

One is an increase in issue-based contemporary art exhibitions, which have attracted, unusually for a small provincial gallery, considerable attention from the national press. The accompanying events have included commissioning works, artists’ workshops, live performances and audience participation. Its innovative approach to audience development has also been widely acclaimed. Like Wolverhampton, Walsall was awarded funding in the subsequent Sunrise Scheme for 1995/6 to 1997/8 to fund exhibitions/interpretation programmes and the post of Audience Development Officer.

In the meantime, the advent of National Lottery funding has made possible another leap forward for the organisation. The Museum’s major problem is that it has always been short of space and good access. In order to relocate the Garman Ryan collection, a £25 million project to establish a new facility has got under way. The project of the ‘New Art Gallery’ has been awarded a grant of £16 million by the Arts Lottery Fund, which represents over 62% of the total capital cost, the rest mainly coming from the ERDF and Walsall City Challenge. The appointment of the architects Adam Caruso and Peter St John for the project has captured media attention even more. The gallery is due to open to the public in 1999, and the former director is now solely responsible for the New Art Gallery project.

Chapter 4. The Enterprise Culture—Income Generation

Introduction

UK government—central and local—and arts funding bodies have encouraged income generation by cultural organisations so as to make them less reliant on the traditional, mainstream funding from the public sector. The advent of plural funding for museums has meant a search for new sources of public funding, including the ERDF, central government's grants related to urban regeneration, and the National Lottery Funds. Non-public sources have included corporate sponsorship, commercial activities (eg retail, catering and venue letting) and admission charges for some museums.

Charging for entry is not discussed in this paper, as the four main Museums studied in Part 2 are still committed to making no charge, although this is one of the most topical issues in museum management across the board in the museum sector. Corporate sponsorship represents another obvious opportunity for income generation. However, all the Museums have found raising sponsorship exceedingly difficult. They have occasionally received some donations of modest amounts from local business people, but even Birmingham—with its industrial tradition—is not in regular receipt of business sponsorship. The Museums consequently have turned more of their attention to commercial activities.

Therefore, in this chapter, I will concentrate on commercial ventures of the Museums and look at shop operation and catering in detail. Walsall Museum and Art Gallery has at the time of writing neither shop nor catering facilities, and hence only the other three are mentioned. The implications of plural funding will be discussed later in Chapter 8.

4.1 Retail

It can be said that museum shops have seen a phenomenal growth over the world in recent years. Retailing may be seen to be primarily concerned with generating income for museums. It is important to note that museum shops originally had a somewhat educational purpose: the provision of souvenirs for visitors to take away, allowing them to recall the objects they particularly liked (Harney 1994, p135). Based on this idea, shops used to be small in size, often the reception desk itself, and tended to have only a limited range of items such as

postcards, local history monographs and exhibition catalogues. Today, however, operating a museum shop is also seen as another aspect of public service, namely to enhance visitors' enjoyment of museum visiting. A shop may have a wider range of books and postcards, T-shirts, gift items and souvenirs such as pencils and key rings. Thus, today's museum shops can be seen to have three functions: to serve as an outlet for post-visit education, to contribute towards the visitors' enjoyment of museums and to generate income (Area Museum Council for the South West 1994).

All the three Museums concerned in this study¹ have 'proper' shops with designated staffing. Birmingham opened its first shop in 1978 to replace the sales point at the reception. It later on added another shop dedicated to crafts, produced by well-known designers and crafts people, including young artists from the local area. Unfortunately, the crafts shop was not profitable, while the other shop was popular. In the light of this, the former was closed and the latter extended in 1996 in the space of former Gallery 1, next to the Round Room at the main entrance. At the same time, the operation was contracted out to the National Trust Enterprise Limited. The Museum receives a fixed rent for the space of £15,000 (1995/6)² and a percentage of turnover which for 1995/6 amounted to £8,000. The total return to the Museum has grown to £34,000 for 1996/7.

Stoke-on-Trent has had a shop since 1979. It has an extensive area where a wide range of goods are sold in the middle of the main foyer at the entrance. The management has always been in-house.

At Wolverhampton, the shop was expanded in 1994, "in order to earn money and to create space for selling crafts" (Director). It is managed by a half-time manager and an assistant. In the pursuit of originality and character, the Museum appointed the current manager on the basis of her knowledge of craft, despite her relative lack of experience in retail business. The shop operation roughly breaks even when the salaries are taken into account.

The three shops seem to hold, if implicitly, the three aforementioned objectives—education, visitors' enjoyment and profit—which are different and possibly conflicting. An assessment of the shop operation reveals difficulties and problems for the Museums in putting these three objectives into practice.

¹ The New Art Gallery of Walsall due to open in 1999 will have a shop.

² Includes the rent for the shop at the Museum of Science and Industry, also run by the National Trust.

An overarching problem is a relative lack of clear direction and focus for the business, whichever purpose a museum prioritises over the others among the above three. Stoke-on-Trent provides an example to illustrate this point. As was mentioned, the space is in the foyer, which is rather open-ended in appearance. This physical location may give an impression that the Museum puts this business literally at its forefront. Commercial retail experts would see it, however, as a symbol for a lack of focus and a source of confusion for customers (Area Museum Council for the South West 1994). Although this particular Museum was set up in the 1970s as a purpose-built site, it has had no specific contained area for the shop: in order to facilitate browsing in the shop to begin with, a shop must be more clearly identifiable as the shop.

Financially speaking, the shops have not been particularly profitable. This is not uncommon among local authority museums and beyond: anecdotally, it is said that amongst museum shops in general only 20% make a profit, another 20% break even and the remaining 60% make a loss. Difficulties tend to arise from the following areas. Each will be elaborated on:

- autonomy in shop management
- initial investment
- staffing
- stockholding

Autonomy in Shop Management

In order to meet financial targets, it is important to allow a degree of autonomy to the shop supervisor and to prevent too much interference from the curatorial side of the museum. Curators may wish to see exhibition catalogues and specialist publications on display, but they are not always easily sellable for many museums. Also, it is important that the supervisor or the shop manager is around in the shop on a day-to-day basis, rather than managing at a distance from their office, so as to gain hands-on insights into sales and customer attitudes.

Initial Investment

As in many commercial businesses, initial investment is the key to profit-making. Museum shops need to invest in proper fittings, lighting, display, stock, product development and Information Technology (IT) systems to achieve effective operation. Museum directors tend to deny the profitability of retail, taking into account salaries for the shop staff and time spent

by senior staff on supervision. There is, however, evidence to suggest that with proper investment and management, museum retailing can be lucrative.

Inherent advantages for shops of local authority museums have not yet been fully exploited, most notably their good location. Also, the clientele tends to be high spenders, and museum collections are an excellent source of ideas for product (Pemberton 1986, p89).

In Birmingham in particular, when considering its sheer volume of visitors, a shop run in-house is said to be a potential money spinner. The retail expert, seconded to the WMRMC from the Marks and Spencer, believes that the contracting out has represented a missed opportunity. There are certain advantages of contracting out, including the release of day-to-day tasks of shop operation, together with income from rent and an agreed percentage of the total sales. However, a few unexpected difficulties have arisen. One issue is related to merchandise. The Museum feels it crucial that the shop is different from a high street shop. The National Trust operation offers a sophisticated product range, but initially items reflecting the collection of the Museum were few. The Museum has taken steps to improve the situation.

Another problem perceived at Birmingham was that exhibition catalogues and specialist books were not always well-stocked. As has been pointed out, the inclusion of curation-related items needs to be carefully considered from a financial point of view; a specialist range of publications may be better sold through other routes. The point is, however, that once the operation is contracted out the Museum cannot push its preferences forward in the product selection and merchandising except through negotiation. It has become more difficult to expect the shop to play an educative role, as the staff of the shop works for its employer, not for the Museum.

Staffing

In such a small outlet as museum shops, staffing is inevitably costly. For local authority museums, this can be particularly the case because of public sector employment practice and regulations. To ensure flexibility in operation, a mixture of full-time and part-time employees is important. In practice, however, the former tends to dominate the workforce, which reduces economic efficiency.

Stockholding

Investment can upgrade fittings and lighting, but if the shelves are empty there can be no profit; this may sound obvious, but this situation does arise. The Director of Wolverhampton experienced frustration in negotiating for the money needed to buy stock before Christmas 1996:

Because Wolverhampton has not got a good gift shop, we are in an advantaged position, and gift items were sold out very quickly....But, we had to beg them (the Council) again and again to fill the shop....There is no business sense at all [at the Council].

Needless to say, the reliability of a shop in terms of basic stock, opening hours and customer care is crucial for its successful operation.

On the other hand, over-stocking can also be found in many museum shops. For example, Stoke-on-Trent had kept, at least until a few years ago when the manager changed, outdated catalogues of exhibitions on display for a long time. Unless it was intended to serve the need of academic visitors or the aesthetic purpose of the Museum and was successful in these respects, the practice has had no positive outcomes. One may wrongly buy stock that does not sell, but that should be cleared for sale twice a year, and one should then start again to get the operation on the right track.

To handle these issues, it is crucial for senior management to review practice and performance and make amendments as appropriate and needed, as in many other aspects of museum management. All in all, the Museums found shop operation not easy, financially or culturally. Nevertheless, shops are one of the most visible areas for visitors, who are prepared to articulate complaints if they are dissatisfied. Part of the difficulty is related to the local councils' stipulations and attitudes. Also it has been made clear that achieving multiple purposes for one activity area is not always easy. Properly invested and managed shops can become a sound venture, but the Museums have in various ways suffered from the range of problems listed above.

4.2 Catering

Examining the area of catering will reveal a different, but similarly unhappy, story of income generation. Catering is simpler than retail in terms of function, by excluding that of education; it aims at contributing to visitors' enjoyment and making profit.

It is, however, more complicated due to food and hygiene regulations. Therefore, the service is regarded as being best run by a franchiser, rather than by internal staff. The Museums, again except for Walsall which does not have one, have refurbished their cafés and increased seating capacities in recent years, in order to raise income and accommodate visitors' growing needs for better facilities. Birmingham has had a café for many years, and the current Edwardian Tea Room was refurbished to reopen in 1992. The surroundings are special and attractive with Victorian ironworks and very high ceilings. The Tea Room is now established as a popular rendezvous point among visitors, tourists, and people working or shopping in Birmingham's city centre. It is available, together with other areas of the museum, to hire for evening functions. The gross turnover for the catering operations across sites returns a net of £65,000 to the museum service.

Stoke-on-Trent's café is in the basement, created as an addition to the current building. Compared to Birmingham, most people would see this place as not very interesting but perhaps acceptable. Wolverhampton has a small café, with a seating capacity of 44, expanded from 24 in 1994. Architecturally this small space has an intimate feel and is full of natural light.

All of the catering is contracted out to the City Councils' commercial services.

The introduction of Compulsory Competitive Tendering (CCT), enacted through legislation, particularly the Local Government Act of 1988, has had an impact on the cafés. In theory, the purpose of CCT is to introduce the principles and practices of the market to local authorities, which is expected to lead to a more efficient service provision. Catering has been included as one of the services that must be put out to competitive tendering. Local authorities, if they wish to keep their own direct provision, have to demonstrate that their service (ie Direct Labour Organisation [DLO]) is cheaper and more efficient than that of their competitors from the private sector.

As to the catering at the three Museums, it is their authorities' DLOs that have won the contracts. And this is the source of problems. The Museums used to run cafés themselves, but catering had to be included in the CCT by the City Councils. Particularly in Wolverhampton and Stoke-on-Trent, the tendering was formulated by lumping together the museum service with all the meal provision made city-wide by public organisations such as schools and hospitals. With extremely tight specifications attached to the contract, and the

required scale of business to provide meals at different kinds of organisations, the tendering was virtually beyond the scope of most commercial operators.

For Stoke and Wolverhampton, the problems which have arisen from the DLO's café operation are three-fold. The first is financial. No income out of the profit made at the cafés is fed into the museum services, which is the nature of the contracts. Instead, they pay management fees to the DLOs for what they see as unsatisfactory service. As a result, ironically, Wolverhampton lost the income of £5-8,000 per year it was making prior to CCT. The Museum feels as if it has been subsidising the inefficiency of the DLO.

Secondly, the DLOs are not particularly motivated to make money, and may not be very keen on improving service at individual sites. The museums are only a tiny part of the large contracts, and do not get the DLOs' attention. Wolverhampton even suffers from unreliability of staffing from time to time. The quality of foods is generally regarded as more or less acceptable at the Museums, but there remains scope for more imaginative and original approaches to the menu, which would have added value to museum visiting. However, as the contracts are of large-scale, in which the Museums occupy a minor space, they find it difficult to make a case for more specific improvements.

Thirdly, the Museums have to appeal first to the 'Client Officer' of the councils who represents them, to request any alterations or to make complaints about the DLOs. It would not be unduly difficult for the Museums to monitor the services according to the standards for three aspects of the work, namely, the inputs required, the work process and the outputs (Walsh 1988, p51). This makes the Museums' lack of control over the service all the more frustrating. The case of Stoke-on-Trent is even worse. Oddly enough, the Client Officer (ie the officer who represents the interests of the organisations receiving services including the Museum) is the same person who represents its DLO. It is not hard to imagine that such a structure leads to a conflict of interests and a lack of objectivity.

In the case of Birmingham, the contract is directly between the Museum and the DLO. Although the Museum feels that the quality of service leaves room for improvement, the above problems at least are avoided. The catering operation is also contributing £65,000 (1996/7) to the income of the museum service.

Underlying these problems are more fundamental dangers of CCT. Walsh (1988, p56) has pointed out an inherent problem of contracting out itself for local councils that they have to

operate with the two different, and often conflicting, principles: principles of hierarchy which they have traditionally held *and* of the market. The case of Stoke-on-Trent represents an extreme degree of confusion even within the sphere of the market principle, where the officer is wearing the two hats of the opposing sides.³

4.3 Other Income

There are at least three other areas for income generation which have not yet mentioned in the above. The first area is developing product licensing, royalties and merchandising, whereby institutions endorse products with subject matter associated with their collections. Merchandising images from the collection is an area receiving increasing attention, and has grown remarkably at Birmingham in the last couple of years. This, however, is more difficult for other Museums, which have not many paintings of famous, sellable images. The second opportunity of income generation is commercial lettings of space for evening functions and weddings which are available at Birmingham and Stoke, two of the largest museum buildings in the case study. Incomes from these are growing, but the total turnover is very small. The third opportunity is charging for entry at branch museums. The income from this is also increasing, but again are a very small part of total income. It is only Birmingham, owing to its size, that is able to undertake these commercial activities to a large enough extent to make any sense out of them. Here, earned income has more than doubled over four years (1991/2 to 1995/6). Nonetheless, it amounts only to about 4% of the total income. Considering the senior staff time needed to supervise the whole operation, this is hardly profitable yet.

Conclusion

This chapter has shown the limited extent to which the Museums under examination have adopted entrepreneurialism with particular emphasis on commercial activities, and a few cases even where the level of income generation capacities in catering was actually lowered by the introduction of CCT.

Since the majority of the problems seem to derive from the ownership of the organisations by local government, it seems perhaps privatisation—setting up a charitable trust for the museum service funded by the council—might help. Indeed, this is one of the points central

³ Flynn (1993, p128) has seen similar cases where trading between 'buyer' and 'seller' is fictitiously done in a book-keeping exercise. According to him, this is already known as the 'two-hatted' approach.

government has been making for some time. For example, Tim Renton MP, the then Minister for the Arts, in an interview for the *Museums Journal* emphasised the importance of being free from “the relatively parochial whims of councillors” which would lead to cut back in museum funding (Wright 1992, p17). In the West Midlands region, there was a seminar at the West Midlands Area Museums Service in 1992 to discuss the pros and cons of ‘de-municipalisation’. More recent voices are heard in a DNH review of museum policy (DNH 1996a). In response, the MGC has issued a pamphlet on the legal details of charitable status (MGC 1997b).

The advantages of charitable status have been recognised, such as an increase in flexibility and autonomy. A sympathetic Board of Trustees (which a museum constituted as a charitable trust would have) would be helpful with members including representatives, for example, from academia, the National Museums, industry, the local press and the council. This issue has been a recurrent one in the central government’s discourse and among local authorities themselves. A particularly notable advantage is the tax relief on business rates given to charity, which would have a substantial impact on museums’ finances. Opportunities to raise income from private sources would also be enhanced (MGC 1991, p26).

A related, critical issue here is the trusteeship of the museum collection, which is a complicated, sector-wide problem. There has been concern that in some cases the legal position of collections is not crystal-clear and the protection for them by law is not adequate (Warren [ed] 1996). Under such circumstances, ensuring the trusteeship of collections is considered to be the priority in the process of museum ‘de-municipalisation’. This however could in many cases be more complicated than might be expected, because different parts of collections acquired over the years (bequeathed, purchased with public money or acquired with private grants) are mostly likely to have different conditions attached on disposal (MGC 1997b).

All in all, local authority museums of recent years are largely reticent about the idea of de-municipalisation. This derives from mixed feelings such as insecurity about the future of funding from the council, ethical belief in the value of publicly-provided museums and, perhaps, lack of confidence in balancing the books. The interviewed directors also stress that the Museums are popular among local politicians as symbols of civic pride. These politicians would be, according to the interviewees, most reluctant to relinquish the ownership of the cultural institutions. It seems privatisation is not seen as an attractive or practical option by

the Museums' senior management, although Stoke is in the process of investigating its pros and cons seriously. In other words, they have decided to keep living with the local bureaucracy, at least for the time being, rather than floating free from it and becoming more like a commercial venture.

Chapter 5. Customer Service Orientation—Marketing and Audience Development

Introduction

The environmental changes identified in Chapter 2 have merged to create a norm: museums need to become more outward-looking and incorporate the views, needs and expectations of the general public into the aspects of the services they offer. A number of terms have been drawn up to refer to this idea, such as customer care and public service orientation. Marketing is a useful concept which can embrace many of these terms, and hence it is used throughout this chapter. Generically, this is taken to refer to the dialogue and exchange relationships between the organisation and its customer, or service user. Because of its broad applications, it has spread in business in the post-war period and in the public sector more recently.

In spite of, or precisely because of, the wide applicability of the concept, its definition is diverse and tends to be elusive. How this conundrum has annoyed the museums profession has already been documented (eg Lewis 1988, p147); there is little need to review and evaluate the range of definitions for ‘marketing’ in this limited space again. The discussion in this chapter broadly follows two prevalent strands of thinking. One is marketing as narrowly defined, referring to a distinctive set of techniques, which has both strategic (eg market analysis and positioning) and practical (eg designing leaflets) aspects. The other is marketing as a broadly-defined, guiding philosophy or orientation in management. This means placing the customers at the centre of management and tailoring the product to meet their needs. In the services the public sector provides, this would encompass concerns with quality, access, choice and participation (Walsh 1989, p7). Thus, while the former definition sees marketing as a distinctive area in management, the latter refers to a principle underpinning across different areas of management. The following sections will examine the Museums in the case study in relation to these.

5.1 Marketing as a Distinctive Area in Management

As more and more emphasis was placed on self-generated income in cultural organisations in Britain, marketing came onto the agenda for museums, though much later than for performing

arts organisations, which charge customers for the services they provide. Whether charging for admission or not, museums were told, explicitly and implicitly by public authorities, that they should be more sensitive and responsive to the market; they should demonstrate their value for money through visitor numbers, and in order to achieve these museums should promote themselves. In an attempt to persuade people to come, their “worthy but dull” (Audit Commission 1991, p6) collections must be presented in a more lively and inviting fashion (eg Hooper-Greenhill 1994, pp33-34); A museum must be “as welcoming to the visitor in catering for physical needs and comforts as in providing for intellectual refreshment” (MGC 1992, p35).

The term ‘marketing’ in the museum sector firstly appeared and became widespread only in the late 1980s, beginning with large Independent museums and some of the Nationals. Not surprisingly, this initially created a negative reaction in the sector, if less so in the Independent sector, while performing arts organisations had gone through the turmoil some time before. There is much evidence, however, that museum marketing indeed was a hot issue towards the end of the 1980s, shown in a number of conferences and publications on the topic (Table 5.1, Appendix B). For example, it was the main topic for the Museums Association’s 1988 Annual Conference. The MGC has also emphasised the importance of marketing (eg MGC 1991, pp61-62; MGC 1992, p46).

Whereas some would argue that museums have always done some marketing without naming it as such (eg Wilson 1988), employing a more strategic approach and professional skills in this particular area has been a new development. There certainly have already been invitations to private previews sent to critics and relevant, influential people, and advertising through posters at least. However, full-time marketing posts were approaching only 40 in 1992, up from 5 in 1988 among over 2,000 museums (MGC 1992?). It would be fair to say that marketing was not widely practised in the late 1980s among local authority museums, in a strategic and systematic way, to include the following:

- analysing the market and the position of the organisation, through SWOT (Strengths, Weaknesses, Opportunities, and Threats) analysis
- clarifying its identity in the market (positioning)
- identifying customers’ demands, while defining its own product (the museum or specific exhibitions)
- setting out objectives and devising implementation strategies (to decide price, distribution routes and promotion).

Reflecting this trend, the four Museums in the West Midlands also began to employ marketing officers; marketing in the narrow sense started to get off the ground at the Museum. Nonetheless, after a short period of efforts in this direction, the development saw a decline.

For Birmingham, it was in the early 1990s that the Museum managed to bring in two professional marketers. It was in a sense a matter of luck that the Council at that time was reorganising, which enabled individual departments to take on marketing and other administrative functions in-house. The two marketing officers did not have career backgrounds in cultural institutions but were personally interested, and were quick to learn.

However, Birmingham underwent a reorganisation of its Leisure Services Committee, through which the marketing function, together with personnel and finance functions, was again centralised. Thus, the two officers were reincorporated into the centralised marketing unit to work for the whole range of leisure services offered by the Council. While there has been one minor advantage of integration, allowing museums to be promoted jointly with other leisure events and facilities, the Museum feels it has lost out considerably. Firstly, the sheer volume of the work the marketing officers at the Council have to do has increased enormously, because the number of officers has not matched the volume of work. The time and efforts allocated to the Museum have become one of many responsibilities. Secondly, the priority in marketing, decided by the Leisure Services Department, is likely to be given to glamorous, council-wide projects, in which the Museum tends to be marginalised. A former Director recalls a complaint made by Terry Grimley, the arts correspondent for the Birmingham Post, who is an influential figure in the media in the Birmingham area:

Press Review used to be nicely organised. Everything was all satisfactory. But [due to the disappearance of the marketing officers], the last time when I went to the preview at the Gas Hall, the door to the Hall was not even open....There were no press packs. We were left trying to work out for ourselves what the exhibition was about, and there was nobody there to answer questions we had. There was absolutely no service.

At Stoke-on-Trent, the Promotions Officer's job was created in 1989 along with Education Officer. The 'Promotions' post was soon switched to marketing. The Director explains that "at that time, there was limited understanding of what marketing was. A lot of people thought marketing was PR." However, there were indicators of progress. The Officer drew up a strategy and pursued individual plans such as distributing leaflets. It then even started to expand into other areas of activities in the Museum towards the wider definition of marketing: "The next five years was to persuade that marketing affects everybody—display of exhibitions and also promoting,...and getting the end product right. Not merely telling

people about it” (Director). Then, however, spending restrictions began to bite. Since the post-holder left in 1996, the post has been ‘frozen’, despite the arguments made by the Director on the need for marketing.

At Walsall, a former Arts Council marketing trainee was employed as the Marketing Officer marketing in 1995. However, as the New Art Gallery project came more into fruition, her job turned out to be more of a press officer to liaise with the national and regional press, or a public relations officer to be heavily involved with the public consultation process of the project. As a result of this development, however, marketing in the narrow sense had to suffer. She, for one, enjoyed her newly-defined job so much that she left within eighteen months for a press officer post at a theatre. The vacancy is being filled.

Wolverhampton is the only museum amongst the four, at the time of writing, which still has a Marketing Officer, who joined the Museum less than two years ago to replace the PR and Promotions Officer. She, together with the Director, develops the marketing strategy and plans. She also undertakes marketing logistics such as the production and distribution of promotional materials, updating the mailing list and targeting specific audience groups according to the nature of exhibitions. She covers the area of Public Relations in addition.

These examples are not untypical. Rather, they represent the national trend of confusion and under-development, or decline in some cases, in marketing among the subsidised museums at local level. There are a number of obvious reasons for this, which are simultaneously symptoms of under-developed marketing. They all are inter-linked, forming a vicious circle.

First, there was a lack of good understanding of what marketing was all about and the procedure required to implement strategies. The MGC’s report on local authority museums (MGC 1991, pp61-62) acknowledged the importance of marketing, but unfortunately the argument was flawed in a number of ways. For example, the report recommended that marketing should be given at least 10% of a museum’s total budget, but how such a figure was derived was a mystery. The provided definition of marketing looked incomprehensible, and the suggested procedure for marketing planning lacked the bare essentials, that is, the identification of the product and the definition of the target customer. Against the background of the overall thoroughness of the report, this alone would illustrate the confusion about the practice at that time.

The second problem, linked to the first, is that the definition of marketing has been mistakenly expanded to include anything commercial or anything that seeks to increase income from private sources. This was apparent in a keynote address of the Museums Association Annual Conference in 1988: “Marketing may be seen as embracing advertising and promotion, fund-raising, sponsorship, and commercial operations” (Foster 1988, p128). A major conference ‘Marketing Museums in the 90s’ (Museums Journal 1988, pp89-100) of the same year seems to have been focused, as a matter of fact, on corporate sponsorship. In fact, seeking corporate sponsorship and private/corporate donations in particular were often included in the brief of the marketing officer at local authority museums which could not afford to employ different designated persons. It might be possible to argue in theoretical terms that the principle of selling is the same whether to customers or to corporate sponsors. In practice, however, the techniques to be used and intelligence to be gathered to do the jobs properly, and not least the respective objectives, are very different and distinct. In a similar vein, exploring plural sources of public funds or commercial ventures were also referred to as marketing, both in the profession and in academia (eg Bromwich 1994).

Public Relations (PR) may have more in common with marketing than the other activities. However, the target groups for PR and marketing respectively, and the kind of information communicated to them and the purposes of the relationships are not always the same. PR tends to focus on influential groups and aims to let them know broadly what the museum is doing. PR may affect marketing, but the two are not the same. This confusion compounded the problem of under-development and hampered the value of marketing as narrowly defined.

Third, many museums were resistant to and distrusted the idea of ‘selling’, as Lewis observed in the late 1980s: “There was—and still is—a feeling, and almost Pavlovian reaction from museum people, that marketing = commercialism = a threat to professional standards” (Lewis 1988, p147). Although support gradually developed, at least among senior managers of museums, there often were conflicts between marketing and the curatorial departments. A typical clash was the curatorial accusation that marketing sometimes distorts or misrepresents the cultural ideas the museum tries to convey. Marketing people on the other hand were frustrated to find that curators were only too happy to release the pile of routine jobs (eg drafting press releases) onto their shoulders, but never to allow the management of a proper marketing strategy.

Fourth, budgets for marketing have been limited, particularly at local authority museums in the last few years (Newbury 1988, p113; MGC 1992?, p36). Unlike performing arts

organisations which charge for their service to customers and hence see marketing as a sensible investment, museums tend to regard it as a luxury. With mounting backlogs in conservation and missed opportunities for collecting on the one hand, and recently growing financial difficulties on the other, marketing has, not surprisingly, received little attention.

Fifth, museums have notoriously lacked information on their visitors, unlike performing arts organisations with their computerised system of customer records. In the absence of an immediate financial incentive to understand the public, research has been scant which casts light on the profile of visitors and their motivations for a visit, the basic information needed for planning marketing (MGC 1992?, p8). This is the topic for further investigation in Chapter 9.

Sixth, reflecting partly the belated awareness of the need for marketing, little help was available to museums. Unlike performing arts organisations, which have benefited from systematic and regular encouragement given by the Arts Council and Regional Arts Boards (Hammond 1988), the museum sector has received no equivalent support. The OAL/MGC marketing scheme, mentioned in 2.2.2, Chapter 2, was a large-scale programme of this kind operated from 1988/9 to 1992/3. It introduced the notion of marketing for the first time to many museums, and financed a large number of projects of a strategic nature such as training. It also funded one-day consultancies on marketing for 50 museums around the country. Although it may have been successful in its own terms, museums tended to be short of resources in order to fully implement recommendations.

This lack of practical help is reflected in the relative under-development of the marketing profession in the museum sector. The publication of 'The Museum Marketing Handbook' in 1994 (Runyard 1994) and 'Marketing the Museum' in 1997 (McLean 1997) must have been long overdue. Apart from these, however, literature of both a practical and theoretical nature has been limited. It has been pointed out that commercial marketing theories and techniques, or even non-profit arts marketing, are not directly applicable to museums, which have different characteristics, a point I will explore in Chapter 7. Nonetheless, academic as well as practitioners' interests have been insufficient to develop the field in its own right.

In these ways, marketing in the narrow sense has suffered from lack of resources, and attention may even be decreasing in more recent years, leading to a shift to its broader definition, as the following section will discuss.

5.2 Marketing Orientation

The other trend has been towards a less commercial definition, which sees marketing as a management philosophy. A typical phrase heard to endorse this idea was “marketing...is not just trying to sell a product....It involves finding out what the consumer wants,...making museums more reactive to the consumer” (Wilson 1988, p98). “It is a management philosophy that puts the customer at the centre of things” (Hirst and Taylor 1988, p153). Therefore, McLean (1977) explains, “marketing affects all types of organisational activities” (p49), and is “a way of thinking, a conviction that museums are for people” (p217). Hence, “the marketing processes are the responsibility of every member of staff in the museum” (p217).

Despite the problems in the first definition of marketing, the broader philosophy has become better understood and valued. It coincided with the emphasis on customer care and consumer orientation throughout public services in Britain, and local government in particular.

5.2.1 Customer Service Orientation

In museums’ practical terms, this philosophy has been translated as an increase in the need to serve the public in broader terms as opposed to enhancing cultural pre-eminence, which form the two guiding principles in museum provision (Hooper-Greenhill 1994). Massive investment has been made at all the four Museums, with funding available for the purpose of improving the quality of public services. Examples include training security and reception staff in customer care,¹ refurbishing shops and cafés, making clearer signage, adapting the text for labels and panels so that it is legible and intelligible to lay persons of all ages, and improving access for people with disabilities. There may still be more to be done, for which another ERDF-funded project (mentioned in 3.1 of Chapter 3) is under way in the West Midlands, but the changes in the Museums in this respect have already been remarkable.

Literature has been growing in this area, perhaps more so than in the conventional core functions of marketing (ie the promotion of the museum or advertising its temporary exhibitions). Practical guidelines on customer care (MGC 1995?) and access for people with disabilities (MGC 1997c) have recently been published. McManus (1994) identifies family groups as a growing, nevertheless much neglected, type of audience, and shows how

¹ Boylan (1991, 1992, 1993a) identifies the cost of training as the significant growth area in expenditure despite overall cuts (from 1990/1 to 1993/4) in his annual surveys of local authority museums budgets. Perhaps the emphasis on customer care has contributed to this growth.

museums can attract them by outlining their physical needs and patterns of behaviour. Middleton (1991) suggests the group aged over 50 is another target group for museums and predicts the kinds of needs they will have in Year 2000.

5.2.2 Audience Development

If the above examples seem to refer only to rather technical or cosmetic matters of presentation which have no effect on the production process itself, however, marketing orientation as a philosophy has witnessed a further evolution in the cultural aspect of museum activities, namely, exhibition. Changes of attitude in programming towards a greater involvement of the audience have been accompanied by the ideal of broadening access to museums. As a consequence, marketing orientation has now taken the form of various projects which often are described generically as audience development. This is now gaining momentum particularly among local authority museums.

Walsall is one of the pioneers nationally in this regard. As a small organisation and with the Council's strong emphasis on serving the local community, it is single-mindedly committed to being locally-oriented. The Museum developed an unconventional exhibition, particularly targeted for young children of between three and five years old, allowing them to freely touch objects on display (called START). Another ground-breaking project was an exhibition of the objects that local people have personally collected, which was repeatedly mounted in 1990, 1992 and 1994. The show has helped to make local people feel more closely involved in the Museum, while "challenging assumptions of taste and value, questioning the canons of curatorial control and blurring distinctions between fine art and popular culture" (Cox with Singh 1997, p160). The idea has attracted the interest of other museums all over the country, and an increasing number of them have participated in the project commonly called the 'People's Show'.

Such an approach is not confined to Walsall. Concerned with the lack of ethnic minorities in the composition of the audience, which is on the agenda of the Council, Birmingham has been organising Asian women's textile projects at Aston Hall, one of its 'community museums', with wide consultation between the museum's curator and the Asian community of the city. It also organised a social history exhibition in 1993 entitled 'Take Heart' to explore the social and industrial history of Birmingham, which involved curators in dialogue with the city's residents for its preparation.

Stoke is proud of its awareness of the access needs for the disabled, not only through physical improvements for which a Gulbenkian Award was given in 1990, but also through training staff in communication with blind and deaf people. Wolverhampton has expanded the brief of the Education Officer, who is now called the Access and Education Officer. The WMA-supported internship (mentioned in 3.4 of Chapter 3) is expected to increase the involvement of the Museum and Art Gallery with the Asian, Caribbean and African communities. It also won the 1996 Gulbenkian Award for having the best provision for visitors with disabilities.

A larger number of similar projects across the museum sector are illustrated in Mathers (1996) and Hooper-Greenhill (ed) (1997). Many subsidised museums have attempted to broaden their visitor base, targeting young people, ethnic minorities and the disabled. Mathers has collected a wide range of different projects from over 100 museums. Some of them are attempts to make permanent collections more representative and relevant to their local communities. Others are outreach projects, which target specific groups and involve consultation and their participation in developing projects. There have been successful cases as far as 'projects' are concerned, backed up by positive comments from the participants.

There are however still a number of problems and naiveté in this area. Mathers (1996) points out the lack of clear objectives and evaluation, the under-estimation of the complexity of the 'community', and the possibility of alienating one 'community' by involving another one. A more fundamental issue in spite of huge successes in specific projects is the unchanged composition of the audience at the main site. She finds that the projects have little to do with the rest of the activities the museums carry out and tend to be regarded as a social service. Given these issues and the relatively short period of time in the development of such a direction, it remains to be seen to what degree museums take the policy of audience development to the heart of their management. Nevertheless, the range of projects achieved and the approaches taken so far are undeniably impressive. This version of museum marketing in its wider sense seems to revitalise the issue of cultural democracy and celebrate cultural diversity.

This particularly meets the desire of arts funding bodies such as the Arts Council of England (ACE) and the West Midlands Arts Board (WMA). While they have emphasised the importance of access over the years, the impact they can make in this respect with performing arts organisations may be less remarkable. The funders understand too well the economic imperatives of their clients and cannot be unrealistic about this matter. A large part of the

money for funding is in any case tied up with revenue grants to client organisations, a tiny part of which may be used for specific projects for audience development.

In the case of museums and art galleries, in contrast, the arts funding bodies are free to leave the major responsibility of revenue funding with local authorities, and support projects specifically related to audience development at their margins. Thus, even small-scale schemes can yield impressive results. In this sense, museums are seen as one of the vehicles with which to achieve their goal of making the arts accessible. The Arts Council's *Glory of the Garden* Strategy may have been disappointing, at least as far as the relationship between the Arts Council and the Regional Arts Associations was concerned, as I have critically examined elsewhere (Kawashima 1996, pp28-29). However, its impact on the Museums studied, excepting Birmingham, has been considerable in helping them with audience development.

Wolverhampton and Walsall are particularly keen to develop art exhibitions and contemporary art projects of various kinds, which have been seen favourably by the arts funding bodies. It was a deliberate choice for Walsall to apply to the Arts Lottery Fund, rather than the Heritage Lottery Fund, for the New Art Gallery project to be funded. Regular funding from the WMA has been more than doubled recently. Wolverhampton also recognises an opportunity here, as the Director clarifies in explaining one of the reasons for the Museum's emphasis on contemporary art:

Their [ACE and WMA's] demands are largely at odds with local audiences [whose preference tends to be conservative]. To get money from them [ACE and WMA] primarily involves working on the contemporary collection....Those stakeholders [ACE and WMA] are working on our prestige and reputation. But we also need to programme to local audience needs. The link between the two is access. Only through access contemporary art is acceptable [to the audience].

The relationship between the Museums and the arts funding bodies is expected to be cemented by the 'Arts for Everyone' (A4E) Lottery scheme. After two years' operation of the Arts Lottery funding, a new category of funding has been introduced since January 1997 in addition to the initial programme of capital funding. New opportunities opened up are:

- to create new work
- to reach new audiences
- for people in all walks of life to participate in arts and cultural activities—possibly for the first time
- for young people to realise their creative potential.

This is one of the largest opportunities made available by the arts funding bodies of which museums and galleries can take advantage. The scheme makes grants from £500 to £500,000

available. As can be seen, this new programme is open to wide interpretation, which is the controversial point from a cultural policy point of view. That aside, it is now up to the Museums to draw up imaginative projects to achieve the objective of audience development and visual arts activities, while money is there.

Conclusion

The emphasis on customer orientation has been transmitted to the museum sector through the term 'marketing'. In its narrow sense, marketing in the late 1980s attracted interest, but the four Museums, as elsewhere, have not made significant progress here. Nonetheless, customer-oriented management and audience development, embodying the wider definition of marketing, have made some development. Projects to broaden access are being carried out particularly with assistance from the arts funding system.

Chapter 6. Towards ‘Three-Es’—Management and Planning

Introduction

The previous chapters have examined the extent to which the four Museums have changed in two areas of museums activities, namely, commercial activities in retail and catering, and customer orientation in relation to marketing and audience development. Another area of imposed emphasis, which in fact is an umbrella concept for the preceding two, is strategic management, or management of a museum as a whole organisation. This, again, derives partly from the Conservative governments’ admiration for the practices of the business sector. It has been emphasised that museums must undertake strategic planning in order to optimise the value and benefits produced by given inputs, or budgets.

Before looking at the experiences of the Museums with respect to strategic management, it is important to have an understanding of the term in relation to strategic planning and performance indicators, as there has existed a lack of clarity about them.

Strategic Management refers to a management practice of cross-functional decision-making, whereby long-term survival and growth of an organisation is pursued. It has been understood that this should involve *Strategic Planning*, which is an activity to spell out objectives, aims, and action plans to achieve these, often set out in a written form. Two points of importance tend to be forgotten here: one is that management does not end with plans, but it needs subsequent implementation, and monitoring for which *Performance Indicators* can be used (David 1995). The other is that strategies can evolve (and make success) outside a formal planning process (Mintzberg and McHugh 1985).¹ In practice, however, strategic planning alone has been particularly highlighted as the first and most important step in strategic management in much discourse over museum management.

¹ They distinguish between ‘intended strategy’ and ‘realised strategy’. In the latter ‘emergent strategy’ is incorporated.

6.1 Strategic Planning

As the benefits of planning are said to be wide-ranging, from the provision of a framework for decision-making and management to the possibility of more effective use of resources (Davies 1996a, p8), this model of management has been prescribed by public authorities for museums. The MGC started to mention in its annual report (1989/90) that it would like to see a corporate plan set out in each museum. The Audit Commission (1991) was also one of the first advocates of this, advanced later by the publications promoted by the MGC (Runyard and Ambrose [eds]1991; Davies 1996a). Overall, the publications have shown the steps normally taken in strategic planning: to undertake environmental analysis, to define corporate, long-term objectives and aims and to draw up action plans. The West Midland Regional Museums Council (WMRMC, one of the AMCs) and some other bodies require a Strategic Plan (or Corporate Plan, Forward Plan) as a condition for funding. The Mission Statement, the American term which further consolidates such corporate objectives, has become part of the UK museums' vocabulary, as it is now a requirement for the MGC's Registration scheme in its second phase. Examples of missions are:

“To offer a distinctive and popular arts and cultural service to the Midlands region and the wider public”.

(Wolverhampton)

“To serve people and promote cultural opportunity”.

(Stoke-on-Trent)

Thus, by 1994, the Audit Commission (1994) could find in a survey that “two thirds of authorities with museums have business or forward plans, and 70% of these plans include performance indicators” (p4). It is said that local authority museums have been generally good at producing Mission Statements and Forward Plans, as they have been accustomed to doing this and to providing crude figures related to performance (eg number of school parties) in reporting to the committee of the local council (Woroncow 1992, p9). In response to the initiatives outlined above, they have delved into the policies which had existed in written documents but had been neglected, and reconstructed philosophies informally understood by senior staff. They then put these together in a coherent framework, wrote their objectives and aims down and drew up implementation plans. It has made sense for local authority museums to prepare a complete Forward Plan, as they can use it as a background document in applying for grants available from Europe, the National Lottery and Single Regeneration Budget.

All the four Museums studied in this paper have experienced the forward planning process on various occasions (eg during MGC Registration, bidding and planning *per se*) in the 1990s, and produced finalised plans by 1996/7. In some cases, it has taken a few years to develop the Plan, as it involved a wide range of consultation, coinciding with a major change in the organisational structure in Birmingham's case. It took time to ensure coherence not only within the Museum's terms, but also in accordance with the Leisure Committee's policy and the Council's overall policies as well.

The value of strategic planning, as was intended by the public authorities, shows itself in the following comments made by the Directors:

Documentation forces you to think forward....It changes direction,...make unwritten things crystallise....Our aspirations and targets are now set out. We may or may not achieve all of them, but they are useful to have.

(Wolverhampton)

We have identified our shortcomings, and prioritised areas for immediate, medium to long-term action.

(Stoke-on-Trent)

In operational areas as well, work has been systematised, which is manifested in numerous policy documents for individual functions and policy areas such as collection, education and equal opportunities. Collection management policy was one of the earliest areas tackled in this respect, since it has been one of the key requirements for the MGC Registration scheme. At Stoke, for example, there was no written explanation of the Museum's collecting policy before 1982, but now there is a revised, formal statement. Likewise, until about ten years ago, temporary exhibitions were planned more or less in an ad hoc way. A system is now operated, starting with the Exhibitions Working Party, in liaison with the Design Officer, the Safety Officer and the Administrative Officer. The lead officer of a specific exhibition has to prepare a well-argued brief, identify target audiences, suggest implications for educational opportunities and specify budget plans. Similar formality and documentation have taken place at all the Museums in this study.

6.2 Performance Indicators

The systematisation of each area in management described above, however, does not always mean that the corporate plans have been firmly established to play a pivotal role in management. Most notably, monitoring progress against objectives, an important part of strategic management which provides the document's *raison d'être*, is not systematically

done. Strategic management is meaningful when plans are implemented and progress is checked against agreed objectives. This leads to the notion of Performance Indicators. The Audit Commission's position in relation to local authorities has been that Performance Indicators should be introduced to evaluate their work (the public services they provide) with respect to economy, efficiency and effectiveness (Audit Commission 1988, 1989, 1991). These three 'E-words' as criteria for performance measurement, as well as the practice of evaluation itself, raise a number of contentious issues, which will be examined in more detail in Chapter 8.

At this point, it is understood that some quantified measures have been emphasised as an instrument for evaluation, which is one of the phases of strategic management. In individual functions, Performance Indicators are more often used, or at least some quantified information is recorded. For example, statistics, such as the numbers of enquiries received, workshop participants and items not yet catalogued, are available along with more global figures such as income and expenditure. These data have been used in the reports to council meetings, sensibly in conjunction with descriptive analysis of the same issues. For example, in a report on a specific temporary exhibition, the significance of the exhibition can be expressed, not just in the visitor numbers, but in such phrases as 'the first major exhibition outside London to show the work of ...' 'the regional and national press gave extensive positive coverage.'

However, Performance Indicators along the lines of the corporate purposes stated in a Forward Plan, which cover a whole range of events and integrate a number of functional areas of museum operation, are not well-developed. This is understandable, for museums' objectives are often difficult to quantify, hence to translate into Performance Indicators as such. It is easy to identify the number of items purchased and their monetary values, but very difficult to measure the success of an exhibition apart from a crude measure of visitor numbers. The difficulty has been confirmed by the various bodies promoting the practice of monitoring. The Audit Commission seems to have given up after a long period of consultation, so does the DNH after commissioning a few reports and asking each National Museum to include Performance Indicators in its own terms.

Amongst local authority museums, an unpublished table of figures compiled by the Tyne and Wear Museums Service is probably the only one of a comparative nature. The Museums Service has been collecting twelve kinds of statistical data from twelve museums services in major cities, excluding London, for four years. The indicators range from subsidy per visitor,

staff numbers per visitor and local population, total income ratio to expenditure, to visitor spend per head.² This collection of statistics is a significant refinement of the two Performance Indicators suggested by the Audit Commission (ie the net cost per visit to museums, and the number of visits per head of population to a museum), though it mainly relates to administrative performance.

In summary, Forward Plans and individual policies and plans have been widely developed among the Museums. However, the latter set of specific policies and plans has been used more extensively than Forward Plans. The usefulness of a Forward Plan has been acknowledged in areas other than strategic management. One advantage has been to facilitate communication and promote understanding of corporate objectives among the staff, particularly in a large organisation, where people tend to be departmentally segmented. The development of the plan itself, as it involved staff consultation and dialogue with the council, is seen internally and externally to have been particularly useful in raising awareness of the need for management. As years pass, the value of having the plan as a reference point will perhaps have been better appreciated. A major advantage has been more pragmatic, namely, its usefulness in bidding for funding.

6.3 Opportunities

The finding of the previous section does not mean, however, that the Museums have been strategically unsuccessful in recent years. As I have hinted in the definition of strategic management at the beginning of this chapter, strategies by definition can take shape without formal planning, or they emerge in practice in the areas not covered by the plan. This has been the case with the four Museums we are examining.

While the plans were being introduced, the management at the Museums has taken on a more political dimension and a greater opportunism, or dynamism of quick responses to external resources. This has been a common trend among the four Museums, despite their size differences, in recent years. Birmingham is a typical example, in a city where cultural policy was developed during the 1980s in accordance with urban regeneration and city-marketing

² The Tyne and Wear Museums Service has been asking the Finance Officers of the relevant museums services across the UK to submit relevant data, circulating the completed table in return. For the director of the Tyne and Wear Museums Service, the purpose is to demonstrate to its governing body (the consortium of five local councils) the cost-effectiveness of its performance in comparison to other services of comparable size. How the Table has been used by others is unknown (David Fleming, Director, the Tyne and Wear Museums Service, telephone interview with the author, 22 April 1997).

strategies to revitalise its economic strength. As such, a 'Heritage Development Plan' existed in the mid- to late-1980s. This might be a part of what we call a Forward Plan today, though it specifically referred to major developments of the museums, set within the context of the city's Tourism and Economic Strategies.

In the Plan, developments were proposed, including the establishment of new museum sites as well as refurbishment of the extant ones. The political and economic climate of Birmingham in the 1980s enabled a number of major events outlined in the document to happen. New capital projects, rather than refurbishment/renovation of old facilities, jumped the queue. The Jewellery Quarter Discovery Centre particularly attracted the interests and resources from the Planning and Economic Development Departments, and was quickly opened in 1992. The opening of Soho House followed in 1995 with a similar support from the Council, while redisplay and refurbishment projects which were top of the Museum's own agenda were delayed.

The Gas Hall tells another interesting story which shows its birth in an unplanned, serendipitous way. The idea of converting the space into an exhibition hall, then being used as an office of the Council which was planned to be vacated, came from the Chief Executive of the Council in 1986. A feasibility study was made by a senior curator. For a while nothing happened. Then, in 1988, a Soviet Festival was being planned city-wide, including major exhibitions from the Soviet Union, but a lack of proper exhibition space was a stumbling block. Delegates were sent to Moscow to discuss details of the festival, but people were stuck when it came to the matter of the exhibitions, which the Russian party was keen to see at the heart of the city. The curator delegate from the Museum cannily suggested that the Gas Hall could be a possibility.

Things were quickly arranged back in Birmingham and the exhibitions took place within six months at the Hall, transformed as a temporary gallery through hasty work. Though after the Festival the space was returned to the previous office, the Council was made aware of the high profile such a space could have, and offered permanent use of the Hall to the Museum. The Council made it clear, however, that it would only meet the cost of development and other fixed costs for maintenance, but exhibitions would have to pay their own way. For the Museum, always desperate for more space for a major temporary exhibition, this was an unmissable opportunity.

Within a year the service was successful in raising the capital cost, £1.5 million from the ERDF, matched by the Council, £2 million from the business sector, and £1 million from a public appeal. In the meantime, a number of preparatory works were carried out. They include large-scale research for the opening exhibition featuring Canaletto, programming of subsequent exhibitions, and other technical and engineering matters. Worries mounted as to what kind of space it could and should be, what facilities such as lighting and lifts should be installed and so on. As the Council provided no extra money, more and more staff time was dedicated to the preparation work. Finally the Gas Hall succeeded in opening in 1993.

If the birth of the Gas Hall shows a positive example of unplanned development, however, the subsequent story of the same venue can reveal in a different sense how a museum's work cannot always develop in a planned way. As was mentioned, the Council stipulated that the Hall should be self-financing, that is, the expenditures for exhibitions should be met by business sponsorship and admission charges.

Both sponsorship and admission charges turned out to be, however, very difficult to obtain despite the strenuous efforts made by the Museum staff. The reason has been attributed to the location not being London and the economic recession of the early 1990s. The Museum had a bitter experience of losing a major sponsorship deal at the last minute for an expensive programme. Visitor numbers were significantly lower than estimated, though the forecasts were conservative, based on comparable experiences elsewhere. It is difficult to single out the reasons for the disappointing attendance. It has been suggested that perhaps the public were not yet prepared to pay, while the main site next door was free. There is also a suggestion that exhibitions could have been mounted at lower cost.

Another factor is the varied menu of the exhibitions, ranging from a traditional art 'blockbuster', historical artefacts shows from other parts of the world, to a photographic exhibition of contemporary art. This has made it difficult for the Hall to acquire a clear identity and core audience. Though the Museum's original ambitions were to broaden the demographic profile of Museum visitors, to present quality works in innovative and unconventional ways and to provide a platform for debate, the financial loss incurred in the first eighteen months made a radical re-think imperative.

While the original objectives have not been abandoned completely, two polarising approaches to exhibition-programming have appeared in recent years. One strategy is to mount exhibitions whose financial viability is fully researched and understood to be sound.

A variant on this strategy is the letting of the premises for commercial hire, where the Museum has no involvement with the content. 1997 is seeing two exhibitions of this non-risk-taking category.

In contrast to this hard-nosed approach to rectifying the financial position of the Hall, local community-oriented exhibitions constitute a second strategy. For example, a major exhibition on the social history of Birmingham in the post-war period is being scheduled for half a year's duration in 1999, which will be free of admission charge. For source materials, this will draw on the permanent collection, which will not require such costs as hire fees and transport. It will, however, involve a large-scale preparatory research on oral history and living evidence, which would push up the cost of the whole project. This makes it all the more necessary for projects in the non-risk-taking category to be profitable, so that they can cross-subsidise community-based projects.

The other three Museums have pursued different types of development, which are more or less similarly opportunities-driven. The first seed was sown when the Glory of the Garden strategy by the Arts Council of Great Britain began to be implemented, whereby new positions related to art gallery sections of the Museums were created at all three of the organisations. Walsall and Wolverhampton in particular have had a strong basis in their art collections, on which to capitalise and build the art exhibition element in the Museums' activities. Bidding for the Sunrise Scheme (post-Glory) and more recently for the Lottery Arts Fund distributed by the Arts Council of England, which they have understood is easier to apply for than the Heritage Lottery Fund, may have been a logical development. The Directors however would emphasise their own conscious approach:

It's not that we're reacting [to arts side resources], but it's extremely fortuitous that the way we're going is also the [way the] funding is going....A whole thing starts to play to your strength once you create your momentum....It's very much like niche marketing ourselves."

(Director, Wolverhampton)

What is clear here is that a conventional, linear pattern of strategic management—goals identification, followed by implementation of plans and progress check—does not fit in neatly with our examples of 'success', as equated with growth.

Obviously, these described developments have taken place prior to, or in parallel with, the strategic planning they were formally engaged in. However, a more convincing explanation can be provided for the limited role strategic planning has played. It is that as part of the local council, whether a director likes it or not, the Museums' success depends firstly upon

being sensitive to the political mood of the paymaster, and secondly upon making the most of given opportunities rather than sticking to written principles. Such flexibility may be important, particularly in recent years, when on the one hand the environment is changing quickly and large sums of money are available for specific projects (eg ERDF, the Lottery and urban regeneration budgets), but on the other hand revenue budgets are shrinking.

Conclusion

The four Museums were engaged in formal corporate planning in the early 1990s, and they systematised work plans. However, progress checking, when it comes to overall, mid- to long-term objectives (as opposed to operational goals of business plans) is rarely seen. The use of Performance Indicators, at least in this context, is under-developed. The Museums' recent developments have been made possible by the favourable opportunities exogenous to them. Whereas the value of planning has been noted, flexible adaptation to the political and economic climate has proved to be a key to success.

This observation is confirmed by a larger sample of over 100 local authority museums, surveyed in 1992 by Davies (1994b). He finds that although over half of the respondents state Forward Planning to be essential, there is widespread scepticism about it. A number of interesting comments which he obtained through in-depth interviews point to the inflexible and static nature associated with planning, and the practical difficulty of meaningful planning under current economic and political pressures (ibid, pp54-56).

Davies (1994b) also notes, however, that not all of the plans are strategic in content (p56), suggesting a discrepancy between managers' stated belief in the value of strategic planning in principle and the amount of consideration given to it in practice. The quality of the plan—the degree to which it is coherent, visionary, imaginative and yet realistic—substantially varies. This finding is endorsed by Davies's other article on Mission Statement (Davies 1996b). Despite the Mission Statement's top position in the pyramid of the Plan, many simply list museums' functions (ie collect, exhibit, research etc). Its quality varies greatly, which leads Davies to suspect that "little thought has gone into mission statements because little of their potential is understood" (Davies 1996b, p38).

The quality of the strategy documents that the four Museums have been produced is generally high, demonstrated by their success in bidding for external resources. However, the

frustration and scepticism about the value of the documents Davies (1994b) finds among museum managers seems to be shared by our cases. This leads us to doubt the appropriateness of Forward Planning, and the issue of performance measurement as well. This is the topic for further analysis in Chapter 8.

Part 3: Discussion - Museum Management

Part 2 has discussed the range and degree of change the four local authority museums have experienced in management. One of the main findings has been that for the Museums the environmental changes identified in Chapter 2 began to have substantial effects largely in the 1990s. Not least, funding of the Museums by councils began to decrease in the early 1990s. Lacking initial investment, commercial activities and marketing in the narrow sense are still very marginal in overall management despite the increasing needs for these activities to be dealt with systematically. Chapters 4 and 5 have provided practical, obvious reasons for the low degree of marketisation at the Museums. The Museums nonetheless have become more conscious of a wider definition of marketing: they have developed customer-oriented operations and taken on the challenge of audience development. Chapter 6 has discussed the introduction of strategic management and plans, while outlining the latest developments of the Museums as a reaction to, or interaction with, external opportunities.

Part 3 will attempt a more theoretical analysis and tease out fundamental, structural and idiosyncratic problems of museums which characterise museum management. While occasional reference will be made specifically to local authority museums, our focus will now be on museums in general. The aim will be to put the local authority museums in a wider museum context, and to give the analysis applicability and implications beyond the limited case study. It is hoped that the analysis will help museum managers as well as cultural policy makers and researchers to understand museums as an organisation. Central to this analysis is an argument that policy makers in public authorities (eg DCMS, MGC) need to be aware that their policy input may not always lead to intended output, as cultural organisations have complex internal mechanisms to deal with and respond to the input in different ways. Part 3 will shed light upon some of the organisational features of the museum based on this assertion.

For the above purposes of this Part, it is firstly important to undertake an organisational analysis of the museum in generic terms, which is the theme of Chapter 7. Distinctive features of the museum in comparison with non-profit service organisations or non-profit performing arts organisations are identified by examining them from four angles. They include the museum's visibility, the organisational role and function of the museum, its external relationships and its internal relationships. I will argue that each of these aspects is fraught with a high degree of complexity, which adds up to making museum management a complicated, difficult and confusing task in practice.

Chapter 8 will look closely at the issue of strategic management. It will discuss why the standard model of strategic management introduced to the museum sector has not been seen as particularly helpful. It will examine the currently prevalent model of strategic management which originates from the business sector and suggest a different version for the museum context. The chapter will then discuss difficulties of performance measurement, which is the key component in an effective operationalisation of strategic planning, by drawing upon the organisational analysis of the museum outlined in Chapter 7. The discussion of performance measurement will be extended to that conducted by external bodies. Chapter 8 will finally introduce some of the alternative approaches to measuring organisational effectiveness, which have been developed in organisation theory literature. These will throw new light on how we view the museum as an organisation, how we approach the issue of performance measurement in the museum and how we interpret what has been achieved in practice in museum management.

Chapter 9 will further my argument on marketing presented in Chapter 5 and highlight the challenge for museums with respect to their relationship with audiences. Chapter 5 has argued that despite some early efforts to persuade museums to adopt marketing, museums have faced practical obstacles to the development of marketing. Chapter 7 will have uncovered the problems of marketing and audience development, which are inherent in the basic features of museums. It will be argued that these structural problems which inhibit museum marketing cannot be easily solved by a practical handbook and training. Another profound problem is that museums do not have a good understanding of visitors. Chapter 9 is dedicated to setting out a research agenda for visitor studies by identifying a number of under-researched areas, where gaps in the museums' knowledge of visitors need to be filled so as to build a bridge between museums and their audience. These shortcomings will be illuminated through an occasional comparison with the situation in the performing arts sector.

Chapter 7. Organisational Analysis of the Museum

Introduction—Literature Review

Museums have attracted attention from a number of academic disciplines. Cultural economists have discussed the rationale of public funding for cultural organisations by examining the functions and cost structure of museums (eg Peacock and Godfrey 1974; O'Hagan and Duffy 1995), or the economic impact of museums (eg Johnson and Thomas 1992). Policy analysts have examined the debates over the issue of admission charges (eg Falconer and Bailey 1993). Historical writings which trace the origin and development of museums and governmental involvement in them (eg Minihan 1977; Pearson 1982; Kavanagh 1994) have made a contribution to an understanding of the contemporary setting of museums. Museums have received the attention of education analysts as well, particularly as a place for school children and continuing education (eg Hooper-Greenhill 1991). Increasingly, a large number of works have been available from anthropology, sociology and cultural studies; they analyse museums as a cultural medium to shape the social relationship of power (eg Bennett, T 1995), or “as a means whereby societies represent their relationship to their own history and to that of other cultures” (Lumley [ed] 1988, p2; similarly Vergo [ed] 1989). Kavanagh (ed)(1991) critically interprets material culture presented in the institution. Macdonald and Fyfe (eds)(1996), and Sherman and Rogoff (eds)(1994) collect essays which discuss museums in relation to global culture, identity, and the interplay of narratives and ideologies.

While many of the works have provided a rich mix of materials for understanding museums, and the wider context in which they have operated, museum management literature has been poorly-developed. A practical manual of museum management (Lord and Lord 1997) has recently been made available, which will be useful for reference. Another recent addition by Fopp (1997) is a book which introduces principles, techniques and theories of business management, regarding day-to-day issues such as delegation and recruitment. However, analysis of issues and problems in museum management by academic research is scant. An excellent interpretation of management literature for the museum context was given by Griffin (1987, 1988) ten years ago, but it remains an exception. Moore (ed)(1994) is a useful anthology of essays which cover a wide range of issues in museum management, but many of the papers are not research-based. As the editor states, there is still little research in this area, particularly studies which approach the topic with theories on organisation and human resources management (Moore 1994, pp6-7). Whilst the point has been repeatedly made that

the direct application of management theory and practice in business would not work (eg Cumming 1985, p36; International Journal of Museum Management and Curatorship 1989, p131),¹ the distinctiveness and peculiarities of museum management have not been made clear. As Griffin (1987) succinctly notes, “very little of the museum literature attends to how museums function as organizations” (p388). Knowledge has been limited in respect of relationships among internal and external players which make up the world of museum management. It is essential to understand the configurations and dynamics of different functions of museums, in terms of their impact on internal management, and in relation to their responses to new environmental changes. What is of vital importance is to generate theories which will help explain, understand and predict management problems.

A few more notable exceptions in having this perspective are found, interestingly, in the museum marketing literature developed by two authors in the UK, namely, Bradford (1991) and McLean (1993, 1995). Although all of the articles by them highlight ‘marketing’, I would argue that their contribution is greater to the understanding of museum management as a whole than to marketing in practice. I make this point in particular relation to their conceptualisation of museums’ relationship with ‘constituencies’ (both external and internal) as part of marketing activities. Although the definition of marketing varies, and may be open-ended, confusion occurs when marketing starts to refer to museums’ constituencies *other than the public* (eg marketing to funders, and marketing to employees of museums). For museum management, however, the importance of these constituencies can easily be understood. It is all very well to argue that marketing affects every aspect of management, and hence marketing theories need to be discussed in close relation to management as a whole. Nonetheless, stretching the concept to the extent that the terms and concepts of marketing and management are used interchangeably creates confusion, and dilutes the value of marketing. It may risk giving another boost to the traditionally strong suspicion about marketing among museum professionals.

My intention here is not, however, to try a full critical review of the papers as marketing literature. Rather, it is to acknowledge their contribution to the analysis of the museum organisation by raising important issues and providing analytical frameworks. Bearing that in mind, a brief introduction to the works are given below.

Both Bradford (1991) and McLean (1993) start with the assertion that the literature on marketing in industry does not easily transfer to museum marketing, which is a not-for-profit

¹ Middleton (1990), a British management consultant, argues, however, that this is a myth (p31).

service in culture, as opposed to commercial manufacturing of material goods. Bradford (1991) when explaining the state of the study in museum marketing states that

there is a clear lack of museum marketing theory derived from studying museums and their functions. There is a need for inductively derived empirically-based studies from which to develop a more appropriate museum marketing theory (p88).

Based on this view, and starting with empirical investigations of sample museums, both writers aim to identify the factors which make museums and their functions idiosyncratic.

Bradford (1991) broke new ground through his fieldwork at four Scottish museums. The main finding in this paper is expressed in a model of museum management, which shows that museum management is concerned with three principal orientations: (1) the management of the organisation itself, (2) the museum's reputation and (3) the museum's relationship with patrons. Bradford sees curators as playing the pivotal role in managing these areas, which reinforce each other to make a "spiral of success" (pp94-95). As the author himself keeps referring to management rather than marketing in the findings section of the paper, this model apparently suggests a basic framework for museum management.

A few problems with Bradford's model are picked up by McLean (1993). One of them is that his conceptualisation of main, external constituencies simply as 'funders' is too narrow. She argues that the constituencies are more diverse and exert more complicated influences on a museum than funders alone would do. Acknowledging Bradford's discovery of the important role institutional politics play in museum management, she suggests a more extensive list of the museum context. The list identifies distinctiveness for museum 'marketing' (*which I suggest should read 'management' in which marketing is embedded*). The list includes (1) the museum's collection, (2) the museum's building, (3) the staff, (4) the organisational mechanisms and (5) the public.

While most of these seem to be related to marketing, what she terms the organisational mechanisms is less obviously so. By this phrase, she means political and social dimensions involved in 'marketing', such as a museum's income structure, its corporate culture and its relationship with external agencies. Funding relationships and reputation manipulation, separately identified as major management areas by Bradford, are included and expanded here. As I have noted earlier, this dimension apparently points to management rather than to marketing as such.

The last article I quote here, written by McLean (1995), introduces two recent theories in marketing literature and notes two observations in their relevance to museums. One is that an increasing emphasis is placed on the quality of service as perceived and defined by the customer (rather than by the service supplier), which challenges the traditionally-held cultural leadership role of museums. Another is McLean's application of 'relationship marketing', a notion that is gaining prominence among marketing academics according to her. She identifies five 'markets' of museums, ranging from the customers, the influence groups, suppliers, to the internal staff, and discusses the importance of maintaining good relationships with them. Again, I would suggest that we should replace the word 'markets' with 'constituencies', so that the implication of the theory will fit in well with museum management as a whole.

To sum up the above arguments they have made, establishing reputation promoting interactions between the collection, the building and the public is an important aspect in museum management, in which the staff plays a crucial role. Another point is the importance of the external groups museums deal with, not just for money, but also for other resources. What follows is my own attempt to take the same approach to analysing museums, but in a different style of conceptualisation and with no particular reference to marketing. The main points are as follows:

- A museum has a relatively high degree of tangibility and permanence, compared to other cultural organisations, a distinctive feature which derives from the museum's collection and building (discussed in 7.1).
- Internally, the museum as an organisation has basically been 'bureaucracy', dominated by the professionals, though this is gradually changing (7.2).
- The museum has a high degree of complexity and heterogeneity in terms of its function and organisational role (7.3).
- Externally, the museum has multiple 'constituencies' or 'stakeholders' (7.4).

All of these points have implications for museum management today and will be explained in the following.

7.1 Tangibility and Permanence

The two features of museums—tangibility and permanence—may be evident when we look at the origin and history of the institution. A museum (in Britain at least) always starts with a collection of some kind, often initiated by private individuals or learned societies. It is later

donated to the community, then made available at a public museum. The museum begins to function when curators are appointed to take care of the collection. The collection however remains as the focal point, “primary responsibility” (Edson and Dean 1994, p67) and the essence of the whole entity. Being material, the original collection in principle remains unchanged, although in many cases it has been expanded and can therefore change in character.

This makes a sharp contrast to performing arts organisations or other public service organisations such as hospitals and schools, all of whose essence is people with expertise and skills, united for the purpose of the organisation. For a symphony orchestra, it is musicians which make up the organisation, not musical instruments or a concert hall. Theatre tends to be even more fluid. It often operates a ‘temporary system’² (Goodman and Goodman 1976), where performers and other experts are called upon by the ‘permanent system’ of administration as needed, on a temporary basis, for the purpose of particular productions (Guiot 1987). It has been argued that museums should have the same principle: they do not exist for the sake of objects; objects are the means of delivering a message (eg O’Neill 1991, p34; Davies 1992, p21; Hooper-Greenhill 1994, pp1-2). Despite such rhetoric, it is hard to deny that, or some would argue it is perfectly legitimate to state that, a collection in its own right represents the *raison d’être* of the museum.

A similar contrast can be drawn between performing arts organisations and museums by looking at the pattern of output. Schwarz (1987, p10) maintains that live performing arts have, by definition, output that is produced and consumed simultaneously. Performance becomes a product only when consumed by its audience, and stays as a rehearsal otherwise. In museums, exhibitions may be analogous to live performance. The difference is, however, that the museum’s function is to present and interpret material culture, history and science, thus acting as the intermediary between outputs produced elsewhere and their arrangement consumed later by an audience.

Schwarz (1987, p12) argues, furthermore, by referring to Baumol and Bowen’s (1966, p164) classic study in cultural economics, that in live performance performers embody input and output, because the bulk of expenditure goes into artistic wages. For museums, it is possible to employ the same argument to explain the aspect of preservation: investing in objects itself is simultaneously the process of benefits production. However, the latest normative thinking

² The definition is “a set of diversely skilled people working together on a complex task over a limited period of time” (Goodman and Goodman 1976, p494).

for the museum sector would see the collection care as an intermediate process for the final production of public display.

While the permanence and tangibility or materiality outlined above can be an advantage for museum management, in particular for marketing purposes, an obvious disadvantage is its inflexibility. The recent controversy over de-accessioning epitomises this point. A school can always get rid of an outmoded computer so as to upgrade the Information Technology (IT) system, or a theatre company can sack an actor who cannot act, both of which will contribute to organisational efficiency and effectiveness. For a museum, collection disposal is far more complicated, involving the ethical issues and cultural responsibilities of the organisation for the past, present and future.

Many of the National and local authority museums in Britain were created in the time of the British Empire. Hence, the collection basically reflects the Victorian white man's curiosity and enthusiasm about foreign cultures and nature. How to make museums relevant to the multi-cultural society of today is one of the most formidable challenges for the museums. As has been shown in Chapter 5, the issue has been addressed mainly through changing the presentation and interpretation of, not by shedding part of, collections, and by outreach work.

7.2 The Museums Profession

Having ascribed the essence of the museum to collection, it is also important to look at the people who make the organisation work, and understand the dynamics of the different groups, which will present profound implications for museum management. While acknowledging the substantial role the security and other housekeeping staff play in the day-to-day operation of museums, for the purposes of analysis, the following will focus on the so-called museums profession.

Like other subjects of museum management, the profession is one of the most under-researched areas in academic literature. Kavanagh (1991) calls for more research inputs from various disciplines, such as history, sociology and social psychology. The research agenda she puts forward is helpful in order to understand the implications of studying the profession within museum management studies. The first research area she points out is the emergence of the profession and its development. The second is the expression of the professional self-consciousness, particularly in the light of the distance it has established from the layperson,

by creating collective identity and maintaining standards. Thirdly, empirical study into the contemporary profile of the profession is requested, which will elucidate management problems and issues, and future directions for museums.

Bearing in mind Kavanagh's (1991) warning on the scarcity of the literature and on the fragmented nature of the museums profession (p48), however, an attempt needs to be made to overview the development and recent issues of museum workers, curators in particular. This will throw much-needed light on the understanding of museum management from a human relations perspective. The following is an experiment of this kind, based on Kavanagh's (1991) own "fairly crude" (p44) chronology which identifies the development of the museums profession, but with my additional focus on the contemporary scene. It is to draw a rough picture of the profession with particular reference to its implications for museum management. I admit it is even cruder than the historian Kavanagh's work, but I have come to the conclusion that I cannot avoid this topic in my analysis of museum organisation. It is open to challenge, and in need of refinement.

Broadly speaking, museums used to have a simple staff structure: the curator-director at the top, a few assistant keepers, clerks and housekeeping staff. Although it is received wisdom that curators play the central role in museums, as Bradford (1991) discusses, the number has been limited in each museum by today's standard. Only in recent decades their number has increased and the profession become more specialised; it is only in the last decade that other new types of professional staff or administrators have been appointed to play important roles which have enabled museums to respond to external changes.

The point is well illustrated in a curious photograph of Birmingham Museum staff, taken in around 1900. It shows the director sitting in a chair, two men in suits (presumably administrator and clerk?) and a woman (secretary?) standing next to him, all of whom are surrounded by a corps of wardens (shown in Davies 1985, p31). It is not that the profession exploded soon thereafter. In the early days, directors and keepers of large museums were often from the privileged class who naturally acquired connoisseurship or could afford eccentricity.³ In some places, scholarship may have been found, but the profession also involved, it would seem to us, a high degree of dilettantism and gentleman's amateurism

³ For example, Wallis, the first director at Birmingham, inaugurated his directorship when he was thirty years old and remained in post for over forty years. Prior to that, he was curator at South Kensington (Victoria and Albert) and had experiences in Germany and France (Davies 1985). Teather (1990, p30) cites Wallis as a notable example of 'dynasties' in museum history, since the Wallis family in three generations served a few museums for a total of 153 years.

(Kavanagh 1991, p44). Non-national museums of the 1920s were largely dependent upon “Honorary Curators”, who were (1) those whose time was mainly taken up with other occupations, (2) gentlemen of leisure interested in the museum and (3) the donor or owner of a museum (Miers 1928). Full-time curators were only found in 14% of non-national museums, about half of which were run by local authorities. Even a survey of the mid-1960s shows (Standing Commission on Museums and Galleries 1963) that most provincial museums only had a very small number of professional staff.

As collections grew in most museums, staff accordingly expanded, and the horizontal division of labour—specialist keepers for individual collections—progressed simultaneously. Through the 1950s to the 1970s, university education had become more accessible and diverse in subjects, and graduates of art history, archaeology, science, biology, physics and so on entered the profession. Thus, people with born aesthetics, leisure and amateur interests have gradually been replaced by people with acquired knowledge through formal education on specialist subjects. Also as museums have become ‘public’—regardless of the constitutional status of the organisation—public accountability of museums has increased, which warrants formal management.⁴ However, it is safe to say that management at this point was still concerned primarily with collections of different curatorial departments, rather than with writing up a strategy to co-ordinate different functions.

A museum which had been developed by that time is similar to the model of ‘Professional Bureaucracy’ as defined by Mintzberg (1983) (Griffin 1988, p390).⁵ This is a type of formal organisation, in which people are given clear responsibilities under a hierarchical structure, but the organisational function relies heavily on the specialist knowledge and skills of the professionals employed. One of the distinctive features of this organisational structure is that it is the professionals that determine the standards of their own work. In other words, there are self-governing associations that set universal standards, and ensure the standards are taught at institutions of higher education and used in practice by the members (Mintzberg 1983, p197). Professionals also seek collective control of the administrative decisions that influence them (Mintzberg 1983, p197), for example, on resource allocation. For this reason, directors in many museums have been ex-curators, representing scholarly integrity or

⁴ Peterson (1986) is a useful source of reference for the understanding of this process. He explains the historical development of formal management among non-profit cultural organisations in the United States, by exploring various internal and external changes to the organisations which had necessitated the rise of arts administration.

⁵ ‘Bureaucracy’ is used here in the Weberian sense, which has no pejorative connotation. The main thread of Max Weber’s theory is a structure whose behaviour is predetermined or predictable, in effect standardised (by written rules, clearly-divided jobs, chain of command, hierarchy and authority) (Mintzberg 1983).

understanding curatorial practice at least, rather than being acclaimed for managerial capacity.

This leads us to the need to look at the rise of curatorship as a profession in detail. Professionals are defined as “occupations based on advanced, or complex, or esoteric, or arcane knowledge” (Macdonald 1995, p1), in a body of research called the sociology of profession. Doctors and lawyers are the prototype of the professional; architects, surveyors and teachers are less obvious examples. Thus in the research, ‘professional’ is marked from the common usage of the term in everyday speech that denotes general competence. The characteristics and traits ascribed to professionalism are the following (DiMaggio 1987, p7, 59) (Note that these are not the conditions for the professional):

- a monopoly of at least somewhat esoteric knowledge
- a body of professional ethics or standards
- professional associations that enforce these standards, accredit training institutions, and license practitioners
- extensive collegial interaction among practitioners employed in different organizations
- a commitment to professional standards even when they conflict with organizational goals, and
- a claim to altruism and disinterestedness or public spiritedness in professional practice.

Research has been developed in this particular branch of sociology to reveal the process of professionalisation, attitudinal and behavioural characteristics of the professionals, and implications of these for the organisation they work for and for society. Examined from this sociological perspective, the curator has not been by any means a perfect professional (however competent individual curators may be in their jobs). To begin with, what curators do is diverse and hard to generalise. While at the Nationals they tend to be specialists of specific collections, in small museums they carry out a range of jobs: conservation, documentation, research, presentation, education and fund-raising. As a result, job mobility between the two sectors has been low (MGC 1987, p17).

No curator of any kind would possess the listed traits in their full sense. Knowledge is not monopolised by the profession, but rather shared with academic researchers. Not everybody can enter the profession, but there is no licensing. National Vocational Qualification, which was designed for the museum sector by the Museum Training Institute (MTI), may start to standardise occupational competence, but it remains as an option, not an obligation. Many curators of today have university degrees in specialist areas related to collections, or an MA

in museum studies. However, the qualifications are, by no means, of absolute necessity. Neither do they have elements of training for future curators, such as in cataloguing, storing and displaying collections (MGC 1987, p52). The Museums Association's Diploma has long been the recognised in-service training, but the MGC's Working Party noted severe criticisms made by museum workers for the irrelevance of the course content (MGC 1987, pp36-40). The Museums Association sets out the code of ethics and has been at the centre of the profession to a certain extent. However, the membership has included both museum workers and museum organisations, thus playing a nebulous role in the process of establishing vested interests. Also the Association has not been successful in attracting museum professionals from the National Museums and small museums; museum workers have thus remained un-united (Tether 1990, p27).

It is clear that curators have managed to transform themselves into a semi-profession from "an incongruous mix of academics, pseudo-academics, amateurs, visionaries and elevated town hall clerks" (Kavanagh 1991, p44) that existed in the late Victorian museums. This is however a 'semi-profession' because what Larson (1977) calls the 'professional project' is not complete: the project is a collective attempt to translate formal knowledge and skills into social and economic rewards by organising the linkage between education and the marketplace. It often proceeds with the state's back-up, and justifies inequality of status and closure of access in the occupational order. The job of curators, however, has remained wide-ranging, unclear and under-standardised. Defining a curator is said to be "unprofitable" (Kavanagh, 1992, p27), as is shown in the following attempt:

A curator is *typically* a specialist in a field related to the collection in his or her care and is responsible for the overall well-being and scope of that collection, including acquisition and disposal, preservation and access, interpretation and exhibition, and research and publication (italics mine).

(Edson and Dean 1994, p230).

From a sociological point of view, the base of curators is thus quite a shaky one.

Despite this incompleteness (semi-) professionalism in the museum sector has a few implications for museum management. First, as DiMaggio (1987) discusses, there is a paradoxical tension between professional orientation to peer control and employee orientation to organisational control. In other words, the professionals employed in organisations are members of two institutions: the profession and the organisation (Harries-Jenkins 1970, p53). As was mentioned, profession by definition tends to be more loyal to standards and values shared by the peer community, which may or may not be in harmony

with organisational goals. This has been a perennial problem for the aforementioned 'Professional Bureaucracy' type of organisations.

The second issue, which is related to museum directors in particular, is a conflict between artistic/scholarly and managerial orientations. Curators as a profession would claim autonomy and self-governance; hence museum directors have traditionally been drawn from curatorial departments. With today's rising need for 'management', however, it is possible to argue the case for a manager with non-curatorial backgrounds. It is not clear yet to museums, however, what a desirable mix of the two should be.

The third area of potential conflict is between the curator's concern with peer review and their attention to the public they are supposed to serve. This paper has touched upon the issue of public service orientation in museums as an emerging area of concern. Seeing this phenomenon from a different angle, it can be said that there has existed a natural tendency for curators as a profession to be more focused on what their professional community would think of their work. Hence, they have tended to disregard the public who are in the way of that direction. There are ample anecdotes to illustrate the point:

If we are honest, I do not think there are many of us in the museum profession who have not at some time resented the effect which the public is having on us or our museum...., there is always the member of the public who seeks to ask the wrong question at the wrong time,...We fulminate internally and unfortunately sometimes verbally about people not understanding what museums are for.

(Wilson 1991, p90)

Closely-related to this is the dilemma curators face between conservation and public display. Traditionally, the curator's professional base comes from their knowledge of the historical/cultural values of objects and expertise in the care of them, and not from their skills in dealing with visitors' needs and interests. To follow the theory of profession, then, it is again natural that curators would wish to store objects away from the public area:

For these people [some curators] the collections they work with are theirs to protect and preserve from all corners. The public represents a threat not only to scholastic quiet required..., but also to the very continued existence of the collections which they so sincerely, if selfishly, love....These attitudes...stem from very proper professional concerns.

(Wilson 1991, p91)

Recent years have seen a changing map of the occupation in five respects. They have perhaps exacerbated the organisational problems of museums, which were full of dilemmas and conflicts already. First, as museums grew, more and more specialisation has taken place in terms of specialist skills. Tasks with which curators used to be engaged widely in a less professional way are now undertaken by such specialists as conservators, IT technicians,

exhibition designers, educationalists and photographers. Whether they are specialists lodged in-house or freelancers bought in, the point is that curators are now in danger of being defined in residual terms. That can, in fact, lift the status of curators in a well-resourced museum by liberating them from many of routine tasks involved in curation and allowing them to concentrate on scholarly research.⁶ At the National Museums, curators are increasingly more specialised in specific collections (MGC 1987, p20). For many curators outside the Nationals, however, the technical specialisation mentioned above can be a threat to their *raison d'être*.

Second, in contrast, the number of support staff in administration (eg secretary) has generally reached a peak or decreased, particularly in local authority museums of recent years. With the increased emphasis on public service, curators are burdened with routine paper work while being involved with education and other services (Anderson 1985, pp27-29; MGC 1987, p20).

Third, the form of employment has changed in the museum sector, as elsewhere in the labour market. Short-term contract workers and specialists are common in many areas of museum work in the UK today. In small museums and local authority museums which have frozen some posts, temporary, part-time and private sector specialists are used to fill gaps in the staffing (Boylan 1994, p5).

These factors inevitably add up to making curators feel vulnerable, insecure and frustrated about their current situation.

Fourth, within many museums, new jobs have been added in response to the expansion of museum activities. Managers for sponsorship, marketing, access and even education (which may sound more traditional) are more or less the creation of recent years. As long as the new professions are confined to their own areas and lower in prestige terms in the organisation, the addition does not create any psychological threat to the curator. However, current management textbooks rightly encourage the integration of these 'auxiliary' activities into the mainstream curation so as to maximise effectiveness (eg Miles 1985). Small- to medium-sized museums cannot always afford to designate staff to newly developed areas; in small museums, a collaborative work style is necessary anyway. The practical solution has been to attempt the merger of the two hitherto distinctive areas. For example, an education officer whose background is primary school teaching might organise an exhibition, while a curator is

⁶ For example, the V&A created a research department in 1990 (see Smith, CS 1993 for details).

recruited from those people with good communication skills rather than specialist collection knowledge. This can be another source of worry and creates a sense of precariousness amongst the traditional type of curatorship. As Kavanagh (1991) observes:

A multiskilled base to museum provision challenges dominant traditions and has begun to erode the all-powerful positions of curator. Curatorial monopolies are under threat and where there is threat, there is tension. (p48)

Fifth, as mentioned in the above, people with the job title of curator or keeper have become diverse in qualities in recent years. Museums cannot any longer afford to appoint a curator solely on the basis of knowledge and love for objects, but more of the abilities to juggle different demands and to work in a team. Versatility and flexibility are the key in a changing environment. As Museum Studies and Heritage Management courses spawned in the late 1980s around the country, postgraduates with rounded—or wide and shallow rather than narrow and deep—knowledge of museum management are entering the profession. Whether they have brought with them a new culture or not is arguable⁷ and perhaps too early to assess. In theory the rise of the generalist curator has the potential to undermine the very base of the profession, namely, esoteric knowledge, which is a concern to the curators of the previous generation for their own welfare as well as for that of collection. An anonymous voice from a traditionalist curator expressed a bitter feeling, deploring that ‘new’ professionals

often have little interest in scholarship, yet feel that they, and they alone, are the ones with the right training to tackle the enormous challenges facing museums in the 1990s....There is, of course, a place—and a very important place—for the non-specialist in the museum world today....(The jobs for them are) to fundraise,...publicity and marketing,..., but to place non-specialists in charge of museum collections can be a recipe for disaster. The general public would be aghast to realise...how difficult it is for many non-specialist curators to identify objects.

(Museums Journal 1992, p33)

All in all, the curator is at the heart of the pains caused by the many changes museums have been experiencing. The three trends explained above bring about strains and anxieties within the organisations, and clashes of cultures in some cases. They then generate management issues such as reorganisation, streamlining job responsibilities, organising styles of team work, establishing communication procedures and changing recruitment and training patterns.

⁷ Jenkinson (1993, p89) sees the perpetuation of attitudinal prejudices which has been held by the curators of the traditional type.

7.3 Heterogeneity

In terms of function and service, heterogeneity and complexity are striking features of museums. The definition of a museum, employed in 1984 by the Museums Association in the UK, is ‘an institution which collects, documents, preserves, exhibits and interprets material evidence and associated information for the public benefit’. Though not explicitly included in this definition, research and education are also important functions. It is possible to bundle these into two sets: one set of functions involves the visitor and the other operates behind the scene. Nonetheless, it is clear that each function is distinctive and singular, though relatively simple (except for exhibiting, which mobilises a number of skills and expertise to make projects happen); the total remains highly heterogeneous. Furthermore, the museum’s aims through these functions are also multiple, such as preservation of the past, advancement of knowledge and learning, and entertainment.

What this feature means for museum management is first and foremost difficulty. To have different functions and roles tends to engender a number of inherent conflicts and dilemmas. One classic example of the dilemmas is the need to preserve vs the need to exhibit, which is particularly problematic for fragile materials such as prints and textiles. Should museums serve the present public by exhibiting or should they be responsible for the future generation by preserving? Education vs exhibition can be a conflict as well. Can a museum encourage a lively atmosphere for the visitor so as to provide an interesting and stimulating opportunity for cultural appreciation, while keeping the contemplative atmosphere of the gallery for those who need it?

As diverse goals and functions are often in conflict in theory, what happens in practice is that they receive different degrees of emphasis over time, sometimes at the expense of others. Zolberg (1986) argues that in American art museums collection management has tended to receive priority, and public service, represented by education, has enjoyed much lower organisational status. The implicit imbalance has remained, despite the claimed importance attached to accessibility, an ideal traditionally strong in American democracy. Anecdotal evidence in Britain, and further afield, tells a very similar story.

Diversity and heterogeneity lead to different criteria for success within the organisation and make it difficult to measure the degree of corporate success. For curators, the success of an exhibition may be equated with the prestige and reputation obtained through good review

articles. For marketing and finance officers, income from admission charges may be the yardstick for it. As this example shows, it is extremely difficult to synthesise into a coherent standard measures of success which are constructed in different dimensions and different time spans. This is however a technique being increasingly required for museum management today.

7.4 Multiple Constituencies

A museum embraces diversity not only internally but also externally. It is common for many public service organisations to have a number of different ‘constituencies’ or ‘stakeholders’, with which various relationships are cemented. Constituencies or stakeholders are “any individuals, groups or other organisations that have a legitimate interest in the museum” (Davies 1996b, p13). They can be internal (eg trustees and staff) or external (eg funding organisations, users etc). It is important to pay attention to the different resources these diverse constituencies bring with them to museums. For Bradford (1991), there are two different types of stakeholders and their resources: funders with money and influencers with reputation.

Although useful as a starting point, Bradford’s model needs more sophistication to reveal the complexity of the museum. Diagram 1 (Appendix C) illustrates this point by identifying different constituencies and the resources they are identified with, such as funding, reputation, regulatory framework and the museum’s *raison d’être* or legitimacy. The museum also relies on a large number of bodies for source materials to realise projects, such as other museums for loans, and schools for educational projects. This web of relationships has become even more complex in recent years because of plural funding. The burning issue is how to prioritise different constituencies and satisfy them so that the museum secures the support of that particular constituency.

It must be noted that a constituency may play more than one role. For example, the MGC is a funder and regulator at the same time. Still further, each constituency does not behave in isolation from others. This makes management more difficult, as the museum needs to accommodate different objectives, requirements and practicalities coming from different constituencies. Matched funding required by the European Structural Funds and the National Lottery Funds is a case in point. Each has its own purposes of funding, eligibility,

procedures for application, selection criteria, time frame and accountability requirements. Finding a source of money which fits in with these is not easy.

Despite these problems associated with multiple constituencies, most organisations may have developed a system with which to absorb demands from different angles and maintained relationships with them reasonably well. A problem can occur when this carefully-made balance is destroyed. The problem is serious when the imbalance is caused by a reduction of resources from one particular body. It can be equally problematic, however, even when it is a positive addition, because the existing internal system needs adaptation so as to cope with the new power balance. While the sheer volume of money made available from the National Lottery funding is good news, the potential imbalance is a cause for concern.

Museums are generally eligible for funds from three of the Lottery Funds, namely, the Arts Lottery Fund, the Heritage Lottery Fund and the Millennium Fund. Each has different objectives and awarding criteria. As was seen in Chapter 6, the relative ease of application found in the Arts Lottery Fund has attracted local authority museums with fine art collections and contemporary art projects, albeit in a small number. While it will be a positive development to have a newly-built gallery for a fine art collection from the viewpoint of visual arts policy, there is a potential for skewed development here. A museum with an eclectic collection may provide an opportunity for a casual visitor to encounter fine arts next to the archaeological objects he or she was originally interested in. By providing a new gallery exclusively for fine art, because that is the condition attached to the funding, such an opportunity is likely to be lost. Another worry is that it possibly serves to confirm the already existing value system within the museum culture, with fine art often at the top of what Cossons (1991, p18) calls a “heritage hierarchy”.

Conclusion

Four features of the museum as an organisation have been elaborated, with implications for management problems. The first feature highlighted is the museum’s tangibility and permanence deriving from collection. The second feature discussed is the museums profession and its changing nature. The third museum characteristic is its heterogeneous functions and goals, which can cause conflicts of priority. The final point is the museum’s diverse relationships with external constituencies.

What has become clear from the analysis is that museums face inherent dilemmas, conflicts and paradoxes, which require constant reconciliation. The area of marketing encapsulates this point, being at the cross-roads of the four features. It is very difficult to define the 'product' of a museum, because it goes beyond the material objects to the presentation and interpretation of them, as well as physical features of the museum which affect the visitor experience. It is also difficult to define the 'customer' at a theoretical level, when the tension between the present and future generations is taken into account, and when the differing demands and resources of constituencies are identified. The introduction of marketing was received with a degree of resentment and antagonism, because curators suspected that the application of a management system derived from business would ultimately undermine the status quo curators have hitherto enjoyed in the institution. Also, curators could envisage cultural conflicts and operational problems with marketing people, which would be caused by each group having in mind different constituencies as the priority.

Thus, it has become clear that the problems of marketing are not only about the availability of practical resources, as has been identified in Chapter 5, but also theoretical, inherent and endogenous. Our analysis of the hindrances to its development in the museum sector is now advanced. It is, however, only about one of several management problem areas. As the following two chapters will reveal, these features distinctive to museums have a number of other repercussions on museum management.

Chapter 8. Planning and Evaluating Performance

Introduction

As has been discussed in Chapters 2 and 6, the need for strategic management at museums has been emphasised in three ways: (1) through initiatives aimed at new public sector management at central and local government levels, (2) via the cultural policy administration network and (3) from within the museum sector itself. Although the formulation of Forward Planning, which includes the organisational mission statement, has penetrated most local authority museums, Chapter 6 has found that strategic management has not quite taken root. The case is particularly evident with regard to the relative lack of progress checking in line with the objectives outlined in the plans.

This chapter will explore in more detail why the standard model of strategic management has not worked in practice to the extent to which it has been supposed to function in the museum context. Analysis will be made by drawing upon the organisational analysis attempted in Chapter 7. Three points are discussed: first, the inappropriateness of the strategic management model currently prevalent in the museum sector (in 8.1), second, related to the first point, predicaments of performance measurement (8.2) and third, alternative evaluative methods for organisational effectiveness (8.3).

8.1 Strategic Management Process

In order to examine the problems of strategic management, it is important to look at the idea of it as it has been understood by the museum sector. Currently available literature and training on strategic management specifically developed for the museum sector is scant. On an ad hoc basis, however, there have been seminars and speeches at MA conferences to discuss the need for management (eg Cossons [ed] 1985; Museum Professional Group 1989; Robertson 1987), and a growing number of consultants are working on an individual basis in museum management. Reviewing written records of what has been said on these occasions it seems fair to say that current thinking in the museum sector has two propositions. One is that the goal held at the moment by the sector is organisational survival and growth, which calls for strategic management. The other is that planning is the key to this process.

The MGC compiled a book in 1991 entitled 'Forward Planning: A Handbook of business, corporate and development planning for museums and galleries' (Ambrose and Runyard [eds] 1991). The book is, however, not different from the conference speeches found elsewhere, if in a more accessible and convenient form. Considering the format of each chapter, running only to a few pages (and yet dedicating one full page to a picture of the author), and the number of chapters written by different people amounting to as many as twenty-five in total, one might be tempted to question the practical or theoretical value of the publication to museum managers. The title is even deceptive, as the guide to actual forward planning is covered by only one chapter (French 1991), while others give contexts or mention specialist areas.

Furthermore, forward planning as explained in this particular chapter of the book is, as a matter of fact, about short- to medium-term business planning. It says that developing a 'corporate plan' involves the following steps:

- agree objective
- list key issues
- agree targets
- produce forecasts and compute gaps
- select strategy
- prepare action plans and budgets,

which are followed by implementation and monitoring.

(French 1991, p35)

In order to provide a clear guideline for long-term, corporate planning, which was missing in the book, the MGC issued a shorter pamphlet in 1996 (Davies 1996b), which is lucid and seems much more practically useful. It recommends that the following steps should be taken:

- agree mission, values and objectives of the organisation
- assess external environment
- assess internal environment
- identify strategic issues
- develop strategies and action plans.

This, again, needs to be followed by implementation and monitoring.

(Davies 1996b)

While Forward Planning, as has been recommended by the MGC, may look a logical, rational, and scientific approach to modern management, it is far more complicated for museums to put the theory into practice. Some of the problems have already been discussed

in Chapter 7, such as the goals of museums (not only functions and roles) being multiple, conflicting and yet ambiguous. The ambiguity is understandable, particularly because of the nature of the service in the cultural sector. The relatively high accountability of museums, deriving from their heavy and often direct reliance on public subsidy, also makes it necessary that stated goals remain vague so as to avoid public controversy. For local authority museums the woolly wording is particularly necessary in order to leave room for varying interpretations by politicians who come and go.

It is difficult to have a vision of the future, which should underlie the whole planning process at a time of uncertainty. In the world of business concrete strategies include, for instance, change of product/business line and merger. Public organisations tend to lack such options and autonomy to change (Koteen 1989; David 1995). Kovach (1989, pp143-144) stresses the implications of organisational constraints which are hardly addressed in the business-based strategic management model but are of importance for museums. Considering firstly the museum's reliance on public funding and limited abilities to generate income, particularly in the case of local authority museums as has been illustrated in Chapter 4, and secondly the museums' guardianship responsibility of collections, alternative future scenarios are too few. Given finally the toughest challenge of measurement problems, the theoretical model for strategic management from the beginning to the end of the planning cycle seems to be dysfunctional in practice.

At the heart of the problem is the fact that the model introduced to the museum sector has failed to take on board an important characteristic of museums or any not-for-profit organisation: their reliance on external, multiple constituencies for survival (explained in 7.4), and hence the importance of constituencies analysis in strategic management. This aspect of strategic management has been well-addressed in the North American management literature for non-profit organisations (eg hospitals, universities, welfare agencies and museums), but less so in the arts management literature in the UK. Davies (1996b) does mention the significance of stakeholders in the process of producing a plan, but the analysis of stakeholders is subsumed into 'external review' in the publication.

Bryson (1988, p52), one of the American writers on non-profit management, highlights the importance of stakeholder analysis in his step-by-step guide to strategic planning. He elaborates on the steps for this particular phase in the planning process, as the identification of:

- the organisation's stakeholders, their stake in the organisation or its output

- their criteria for judging the performance of the organisation
- how well the organisation performs against those criteria
- how the stakeholders influence the organisation, and
- how important the various stakeholders are.

Thus, this model by Bryson looks at a whole range of stakeholders, including those which may be categorised neither as ‘threats’ nor as ‘opportunities’ in the SWOT analysis framework, and examines them in more detail. As I have argued in 7.4 of Chapter 7, museums have a large number of stakeholders, or constituencies, who have various demands, expectations, and criteria with which to judge organisational success. These may be held implicitly or explicitly, and expressed in clear or ambiguous terms. For the manager of a local authority museum, the most important stakeholder to understand is, oddly but obviously, its governing body: the council. Its influence is enormous on the future of the museum: the council is the integral, internal part of the museum in constitutional terms, but also the most important external machinery in the sense that it provides the bulk of financial resources and the civic status.

Understandably, museum workers may well resent thinking of themselves as being led by the demands and interests of the bodies external to them. However, to manipulate and influence them proactively, rather than be trapped by them, it is all the more important to conduct a comprehensive constituencies analysis and define their individual relationships with the museum. The analysis will yield indispensable information, with which the museum should devise various strategies for coping with interdependent relationships. Alternatives to mere compliance with external constraints are in fact numerous, as Pfeffer and Salancik (1978) identify:

1. Adapting to external demands or avoiding external influence, by:
 - controlling demands
 - controlling how the satisfaction of demands is defined
 - controlling the formation of demands
 - changing the visibility of the organisation’s behaviours and outcomes
 - organisational change to adapt to the environment, in its structure, pattern of management, its product etc.
2. Altering patterns of interdependence through growth, merger, and diversification
3. Establishing collective structures of inter-organisational behaviour (eg co-optation, joint ventures)

4. Creating the organisational environment through law and political action which caters to the needs of the organisation.

Some of the above may contain business vocabulary, but the concepts are largely transferable. Competent managers may already have an understanding and experience of how best to play with different stakeholders, as was seen in the case study. It can still be convincingly argued, however, that the analysis needs to be systematically incorporated into strategic planning at least. An even more interesting view presents a reverse picture: stakeholder management is more important than strategic planning as far as strategic management is concerned. This is mirrored in a concluding view that Davies (1994b) has derived from his survey on the use of Forward Planning at local authority museums. He sees that planning is becoming a tool for persuading and convincing stakeholders, which is central to management. Developing a discussion on this model of strategic management as an alternative to the planning model was not, it seems, within the scope of his paper. This is the topic I will turn to in 8.3 to conclude this chapter.

8.2 Measuring Performance

As has been repeatedly mentioned in this paper, performance measurement is said to be an integral part of strategic management. This section will unearth why evaluation¹ is much more difficult for museums than is implied in the prevalent strategic management model which I have criticised in 8.1 above. I will be offering an exploration and conceptualisation of what is perhaps empirically known by museum managers, thereby suggesting one of the major reasons for the limited usefulness of the management model.

A typical model of strategic management would show that evaluation can be done by reviewing objectives and checking whether or not they have been achieved. At the level of a project or a particular function (eg documentation) this may be a straightforward exercise, as long as the objectives are clear and realistic. When it comes to corporate level, which we are looking at, this becomes extremely difficult.

In the following, terms such as input, output and outcome will have to be heavily used, though they have no single set of definitions. In simple terms for the museum context, input can be, for example, budgets and staff time on a particular project. Output may include

¹ In museum parlance, this term often appears in references to specific exhibition/exhibits. In this paper, it is not confined to this usage, and is used interchangeably with performance measurement.

numbers of visitors, exhibitions mounted, works purchased, items documented and publication records staff have contributed to. Outcome,² in contrast, would include more intangible, long-term results of policy, such as advancement of knowledge in the cultural and artistic fields, educational impact on the public, improved quality of collection and more general values contributed by museums to society, present and future.

Another important issue to note about evaluation at this point is that it is highly value-laden in a number of aspects: by whom, to whom, for what purposes, with what criteria, when and how it is done (Kanter and Summers 1987; Carter et al 1992, p42; Jackson 1991, p50). In order to organise the following discussion, the first three aspects, namely, who the evaluator is, who the audience is and whose criteria are used, are particularly useful.

Each can be internal or external to a museum. Although the distinctions may be much blurred in practice, it is helpful to identify different models of evaluation. As Table 8.1 shows, an evaluation can be done internally, using the criteria of its choice and for its internal use only (Internal Model 1). An evaluation can also be conducted by external assessors, employing the criteria of their choice and for their use, whatever that is (eg decision-making in funding) (External Model). In between, an evaluation can be carried out by internal examiners, using either internal or external criteria, depending upon the situation (and perhaps combining the two sets), and for the external body's use (Internal Model 2).

Table 8.1 Models of Evaluation

	<i>Evaluator</i>	<i>Criteria</i>	<i>Audience</i>
Internal Model 1	Internal	Internal	Internal
Internal Model 2	Internal	Internal or External	External
External Model	External	External	External

Following this schema, the next section (8.2.1) is concerned with Internal Models 1 and 2, followed by 8.2.2 which examines the External Model.

8.2.1 Problem of Evaluation—Internal

The difficulty involved in the evaluation of work carried out by non-profit and public organisations is well-known (eg Kanter and Summers 1987; Carter et al 1992; Smith, P [ed] 1996) and applicable to museums. As has been discussed in 7.3 of Chapter 7, the objectives

² Johnson and Thomas (1991) likewise emphasise the distinction which I have made between output and outcome, by using the terms 'intermediate' and 'final' outputs (pp17-23).

of museums' activities—such as improving quality of life, academic excellence and making collections as accessible as possible—are multiple, conflicting and difficult to translate into quantitative terms. Their 'official' goals may be different from 'operative' goals (Perrow 1961), which may not be unitary even internally. Much of the work museums carry out is the provision of service to the public, which shapes itself at the point of consumption (Peacock and Godfrey 1974, pp196-197) in a complex way (McLean 1994, p194). The service also has some degree of collectivity or semi-publicness. For example, by preservation, museums serve the future generation (Jackson 1991, p62). All of these points made above suggest that the outcome of strategies is very hard to assess. Though the 'output' (eg number of visitors and temporary exhibitions) should be obtainable, they still pose problems of interpretation and integration in line with the corporate objectives.

Furthermore, some of the outcomes may not become visible for a long time, and are often affected by other variables over which a museum may not have control. For example, the number of school visits is very much affected by the resources schools possess and further by the education policy of government. It has been pointed out that museums rely on a diverse range of groups for a variety of different resources. Some constituencies are indeed collaborators who make museums' work possible. These affect the effectiveness of museums' work by creating constraints or multiplying minor effects. Evaluation of individual organisations does not take into account such inter-organisational aspects of performance.

The artistic/cultural/historical and scholarly quality dimension of a museum as a whole, or its project, will probably need to be judged by disaggregating 'quality' into different units of analysis. The cultural economist Throsby's (1983) definition of 'quality' is a useful conceptualisation for us. The original classification is constructed to study the role of the quality dimension in the formation of consumers' demand for the performing arts. With some explanations and examples which I have added in order to adapt it to the museum context, it looks as follows:

1. Source material—ie the collection and wide-ranging services a museum offers
 - its nature (ie classification such as Egyptology, British Painting, classic or contemporary etc)
 - overall standard of the material
2. Technical factors—means of delivery (eg standard of design, standard of the museum building)
3. Benefits to audience (eg emotional and intellectual stimulation)

4. Benefits to society (eg promotion of a national identity, promotion of international understanding)
5. Benefits to the discipline(s) (eg innovative interpretation, provision of a comprehensive collection of a particular kind, experimentation by visual artists).

Throsby sees the first three factors as particularly relevant to the formulation of the private demands of consumers, whereas the last two may influence the decisions funding bodies make. To the cultural supplier, it seems that all of these, if to different degrees, have relevance.

In contrast to such complexities when dealing with the qualitative dimension, what have been called Performance Indicators are largely centred around the issue of efficiency. For example, in a national survey of UK museums the MA found that four quantitative Performance Indicators were in common use: (1) documentation backlog as a percentage of total size of collections, (2) income as a proportion of gross costs, (3) cost per visits and (4) cost per head of population (Museums Journal 1994b, p8). The Audit Commission (1991, p38) suggested a number of indicators, for example, expenditure on research, cost of storage and days open per year. As can be seen in these sample indicators, easily measurable items tend to prevail. In these, input and process (eg costs) are often emphasised, and even misunderstood as output and outcome (ie achievements and effects). Conceptual as well as semantic confusion is not uncommon. Performance Indicators should, by definition, be more about the latter group of output and outcome. Provided that there is strong correlation between the first group and the latter group (eg the more input results in a certain state of output/outcome, for example, more in quantity leads to better quality), the first group can be understood as the indicator of performance.³

Ames (1990) has tackled the modelling of Performance Indicators in concrete terms, and has set them out in a table. To illustrate my discussion in the following, selected indicators and their formula are adapted from Ames's table, shown in Table 8.2. While his attempt is an admirable first step (there is almost no precedent to his work), the items arrayed in the table are wide-ranging; they cover too many fields in a single dimension such as exhibition and research (curatorial), and fund-raising and building maintenance (administrative). Some are strategic issues-related (eg attendance trend, exhibit/exhibition balance), while others are at best cost-efficiency in housekeeping areas (eg energy efficiency). He distinguishes them only

³ Baumol and Bowen (1966) argued that this correlation is to a certain extent valid in the performing arts. See also Schwarz quoted in 7.1, Chapter 7.

in functional terms, but no hierarchy is suggested to arrange them in a strategically-oriented structure.

Table 8.2 Selected Performance Indicators from Ames (1990, 1991, 1994)

Museum Function: Human resources (paid staff and volunteers)

<i>Performance measure/purpose</i>	<i>Formula/ratio</i>
<i>Staff intellect/contribution to field</i>	$\frac{\text{no. of advanced degrees} + \text{no. of external publication this year}}{\text{total staff FTE}}$
<i>Benefits equity</i>	$\frac{\text{staff benefits (\$)}}{\text{staff payroll (\$)}}$

Museum Function: Access/admission/security

<i>Performance measure/purpose</i>	<i>Formula/ratio</i>
<i>Attendance Trend</i>	$\frac{\text{this year's total attendance}}{\text{average of last 3 years attendance}}$
<i>Security efficiency</i>	$\frac{\text{security cost}}{\text{total sq. ft./attendance}}$

Museum Function: Programme (exhibits, collection, education)

<i>Performance measure/purpose</i>	<i>Formula/ratio</i>
<i>Collection use</i>	$\frac{\text{no. of collection objects exhibited}}{\text{no. of objects in collection}}$
<i>Average exhibit maintenance results</i>	$\frac{\text{exhibits out of order}}{\text{total no. of moving part exhibits}}$

Source: Adapted from Ames (1990)

Absence of analytic schema is still evident in this table. While all the indicators are expressed in ratio terms (eg Total marketing budget to Total admissions income as the formula for Marketing efficiency), some other Indicators which can be expressed in crude numbers but are even more useful (eg number of school parties) are missing. The purposes of the indicators, or what they would imply to a museum, are unclear; most are not very meaningful unless compared over time. There are indicators of a prescriptive nature which will signal a warning that something is going wrong. They may however be better expressed in crude numbers rather than in ratio terms. For example, 'Exhibits out of order' to 'Total number of moving part exhibits' represents 'Exhibit maintenance capability'. For a museum manager, however, to realise the museum has ten exhibits to fix is perhaps more useful than

to know 3% of all moving parts is out of order. The same table and indeed the whole article has been reprinted over the years (Ames 1990, 1991, 1994), and no refinement of the table has been made by the author or anybody else in a published form. Thus, its value may be, as the author himself notes (Ames 1990, p147), as a reference for individual museums, who then need to formulate their own sets of indicators.

Jackson's (1991) "suggestive" (p53) list of Performance Indicators, which develops Ames, is clearly related to the 'three-Es'. Table 8.3 reproduces selected indicators from his list. However, while "productivity indicators" for efficiency are ample (eg per visitor gross sales income), he suggests only "results of surveys of customer's perceptions of the displays etc" (p53) as an indicator to measure effectiveness. He does not recognise other areas in which the museum is engaged, such as collection and scholarship, which perhaps is an oversight often made by non-museum specialists.

Table 8.3 Jackson's Framework for Performance Measurement, Selected Indicators

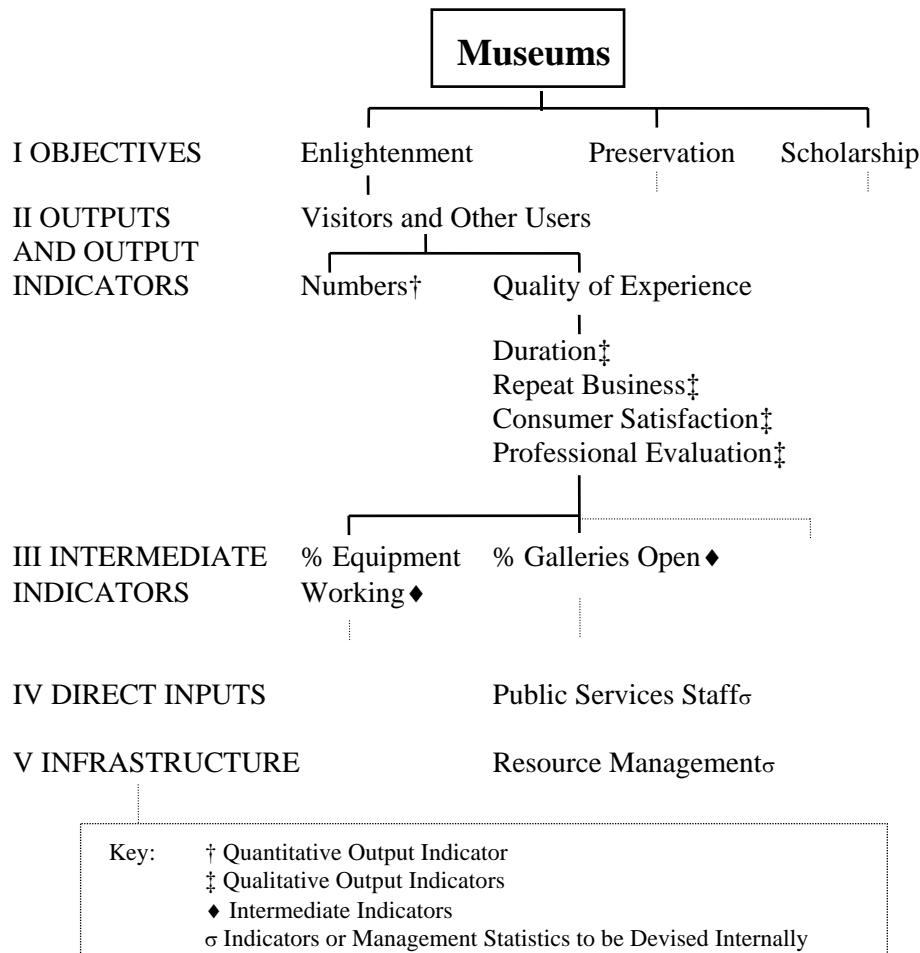
<i>Measurement Areas</i>	<i>Indicators</i>
<i>Cost Indicators (Economy)</i>	<i>gross costs of service</i> <i>gross costs per visitor</i> <i>ratio of revenue to gross costs</i>
<i>Volume of Service</i>	<i>number of attendances</i> <i>attendances per day open</i> <i>hours open per day</i>
<i>Productivity Indicators (Efficiency)</i>	<i>energy efficiency</i> <i>per visitor gross sales income</i> <i>marketing efficiency</i> <i>fund raising efficiency</i>
<i>Availability of Service (Equity)</i>	<i>low income accessibility</i> <i>number of concessionary users</i>
<i>Quality</i>	<i>exhibit maintenance</i> <i>number of complaints from users</i> <i>expertise of staff</i>
<i>Outcome Indicators (Effectiveness)</i>	<i>results of surveys of customer's perceptions of the displays etc</i>

Source: Adapted from Jackson (1991)

A far more sophisticated framework of a chart style (a part of which is reproduced in Figure 8.1) has been developed by the Science Museum in London, in a study it commissioned from Brunel University (Bud et al 1991). The chart includes some of the indicators which are not quantitatively-measurable or easily available, such as Consumer Satisfaction. The virtue of

this framework is that it structures indicators, measurable and non-quantifiable, in a coherent way under the three major objectives of the Museum (ie enlightenment, preservation and scholarship), and distinguishes direct inputs, outputs and intermediate indicators. It thus demonstrates a strong conceptual base, perhaps because it has been constructed specifically from the perspectives of the Science Museum, involving consultation with its staff.

Figure 8.1 Performance Measurement Model—The Science Museum



Source: Adapted from Bud et al (1991, pp30-31)

When the need arises to show the outcome of the museum service to external bodies, evaluation begins to have different effects on the museum organisation. We will now turn our attention to Internal Model 2 (Table 8.1). Smith, P (1993) summarises behavioural problems caused by evaluation. He sees that outcome-related Performance Indicators, when used obsessively, might encourage the following, and thereby produce adversarial side-effects in organisational behaviour:

1. Tunnel vision—concentration on certain areas to improve Performance Indicators, to the exclusion of others
2. Suboptimization—the pursuit by managers of their own narrow objectives
3. Myopia—management being obsessed with improving performance in the shorter term, at the expense of long-term objectives, which may not contribute to immediate improvement of Performance Indicators
4. Convergence—developed between organisations in the same evaluation scheme, to avoid standing out (and being picked up for further scrutiny)
5. Ossification—stifling innovation and experimentation
6. Gaming—altering behaviour so as to obtain strategic advantage
7. Misrepresentation—changes in reporting, including fraud.

For external use, the design of suitable Performance Indicators for a specific constituency needs a careful selection of items and presentation style. Massaging figures may be necessary, and a technique equivalent to ‘creative accounting’ may also be called upon. The problem is compounded by the advent of plural funding for UK museums, because funding organisations vary in terms of their agenda and the demands they make. Hence, they differ in the criteria for performance measurement of the museums they fund, and also in the degree to which they are satisfied with a given result. This effectively requires different sets of evaluation packages tailored for different constituencies, major funders in particular. Given chronic constraints on resources, this task may not only be daunting but also counter-productive for museum management.

8.2.2 Problem of Evaluation—External

This last issue of evaluation by external bodies for their use brings us to a larger issue of cultural policy, namely, the increased emphasis on public accountability and ‘value for money’. Funders of museums, such as the DNH and local authorities, are no longer satisfied with being told of the need for public subsidy. They need to know how well the money has been spent, which is expressed in the ‘three-E’ words: economy, efficiency and effectiveness. These are the broadly-defined criteria often used for the External Evaluation Model (Table 8.1).

Public authorities have been concerned with this issue, manifested by the DNH’s interest in the comparability of Performance Indicators produced by the individual museums it funds, and the Audit Commission’s series of work (eg Audit Commission 1994) on Performance Indicators to compare museum provision by local authorities. Nonetheless, for the same

reasons given in 8.2.1, the three concepts are not easy to operationalise in the examination of museums. The difficulty of measuring quality in effect has led to a number of so-called economic impact studies (eg Myerscough 1988) since the mid-1980s; the rising concern with the accountability of public service provision has necessitated the expression of outcome (of some kind) in numerical terms.

The Audit Commission has struggled to find good Performance Indicators specifically for the provision of museum services, in an attempt to adapt to this area the features which indicators should cover for any service provided by local authorities. Ideally, indicators are supposed to show:

- the overall cost of the service to the taxpayer
- the amount of service provided
- the extent of the use made of it by the public
- the quality or effectiveness of the service
- its value for money

(Museums Journal 1993b, p30)

The Commission once proposed the employment of two indicators, namely, the net cost per visit to museums, and the number of visits per head of population to a museum. Clearly, the former is input; the latter is output. A serious problem, which upset the museum community, was the neglect of the multiple functions performed by museums. For example, collection care, which is relatively conducive to measurement, was not, curiously, included. The Audit Commission ended up by excluding arts, entertainment and museums from the comparative league tables it has to publish with data collected from the local authorities.

There has been some confusion and lack of clarity about the issue of evaluation. There is no single definition of the 'three-Es', and some academic commentators have even added other E-words such as equity to the criteria. However, the general consensus on the definition would be that economy refers to minimising the cost of input as much as possible; efficiency is defined as the rate of output produced to input, and effectiveness as the rate of outcome to input.

Note that in this conceptual model of the 'three-Es' public authorities are concerned with the value derived from the money they make available to the museums in question; they do not necessarily judge value in the light of the organisation's objectives and their criteria for evaluation. In practice, the objectives stated by the museums are of course considered and presumably agreed, particularly by those bodies providing revenue grants. In theory,

however, and possibly in practice from time to time, the museum's view of organisational effectiveness can be very different from that of external bodies. This is a topic for further exploration in 8.3.

A further problem, as has been pointed out by Pollitt (1990, p59) for public sector management in general, is that the 'three-Es' do not always go hand in hand. Most apparently, economy of inputs (ie minimised budgets) may damage effectiveness (eg improving collection). Economy can harm efficiency, too. For example, by not investing in a better IT system museums may be wasting staff time. The pursuit of efficiency may militate against effectiveness. A blockbuster exhibition may be expensive, but can be efficient by attracting a huge number of paying visitors. However, cramped galleries result in a poor quality of experience for visitors, thus hampering effectiveness. There are instances where at least two of the E-words go together, but that does not always produce favourable effects. For example, achieving greater efficiency, museums may end up with 'economy', ie budget cuts from funders. This in effect means that museums are penalised for resource-stretching operation. Given these paradoxes and incompatibilities of the 'three-Es', it comes as no surprise to us that museums are doubtful about the credibility and usefulness of external evaluation.

8.3 Organisational Effectiveness

In the preceding section of this chapter, particularly in relation to Internal Evaluation Models, lies an implicit assumption that stated goals set the yardstick for measuring the success of museums. Questioning this basic view of organisational success will explain why strategic management, as advocated for the museum sector, has not been very useful. What needs examining is a view that modern organisations are constructed in order to achieve specific objectives. It follows that management has to provide an appropriate structure, allocate resources and mobilise people's commitment to effect achievement. In this view of organisations as a rational entity, "the actual effectiveness of a specific organization is determined by the degree to which it realises its goals" (Etzioni 1964, p8) (called the Goal Attainment Model for measuring organisational effectiveness).

This model appeared in management thinking in the 1950s. A number of alternative views have already challenged it in management and organisational theory literature (Robbins 1990, pp49-50), albeit not very much in museum management. There is much to be gained from the

cycle of setting objectives, implementing strategies and monitoring progress, and this may remain at the core of strategic management. However, it is increasingly difficult for museums to stick to it. The reason is that this approach is said to be the most useful and viable, when goals are clear, consensual, time-bound and measurable (Cameron 1986, p542). Clearly, the very problem of museum management in recent years is that museums cannot meet any of those criteria. The environment in which they operate is complex (eg the introduction of Lottery funding), uncertain (eg government funding), diverse in terms of perceived demands and needs to satisfy, and changing over time. Attention in museum management now needs to be drawn to alternative approaches and thinking. The following is an introduction to only a few among the many theories on organisational effectiveness evaluation. An assessment will be made in terms of their relevance to museum management.

Some of the alternative views are centred around examining the means for achieving goals rather than the ends themselves. The so-called resource dependency theory (eg Pfeffer and Salancik 1978) needs to be remembered here. It has already been mentioned in 8.1 in this chapter in relation to stakeholder analysis. It sees all organisations as basically dependent upon external resources for survival. Organisations are therefore not conceptualised as “self-directed, autonomous actors pursuing their own ends” and instead are seen to be “in a constant struggle for autonomy and discretion, confronted with constraint and control” (Pfeffer and Salancik 1978, p257). In this school of thought, therefore, organisational success is measured either by the extent to which the organisations can acquire resources, or by the degree to which all strategic constituencies are at least minimally satisfied (called the Strategic Constituencies Model).

The ‘Systems Resource Model’ expands on this. It examines, on top of resource acquisition, the organisation’s ability to maintain itself internally and co-ordinate relationships among the various subsystems (summarised by Robbins 1990, p58; Cunningham 1977, pp465-466). In both models similarly original goals are of secondary concern, as long as continuous growth and survival are achieved in the internally-maintained system with acquired resources. The goals may, and should if appropriate, change. In this view, the term ‘opportunism’, as was used earlier in this paper to describe the development observed in local authority museums, loses its cynical connotation. It begins to be seen as the symbol of dynamism and indeed success in its own right.

The Strategic Constituencies Model is particularly pertinent for non-commercial organisations, including museums, whose income sources are multiple, such as grants,

subsidies, donations and user fees. Non-financial resources such as legitimacy and reputation, which are as important as money, also come from different constituencies (see Diagram 1, Appendix C). (In contrast, business companies are basically engaged in economic exchange relationships in the market place. They derive inputs from consumers and stockholders, and produce outputs directly to benefit them.)

This model of organisation leads to stakeholder management. For an organisation with influential stakeholders who have clear demands, its survival depends upon the satisfaction of them, rather than attaining organisational goals as originally embraced. In this model, defining organisational goals and the strategies for achieving them will best be done in consultation with key constituencies, as a form of co-optation. As far as museums are concerned, in practice, some stakeholders may not be very clear about their expectations, in which case the museums are in a favourable position to educate and lead them. However, there also is a concern: stakeholders who have tangible, short-term influence on the museums' future, most notably funding organisations, tend to overshadow the stakeholder who is the least organised to have a say: the general public.

As has been mentioned in 8.2 of this chapter, different external stakeholders hold different values, preferences and interests for organisational effectiveness. A more recent approach, the Competing Values Model (eg Cameron and Whetten 1981; Quinn and Cameron 1983; Quinn and Rohrbaugh 1983), is relativistic, acknowledging such diversity. This is related to the view that an organisation is an amalgamation of different interests, rather than the one created and governed by rationality. Another focal point of this theory is the organisational life-cycle, that is, as organisations grow, each constituency's values and their relative priority tends to change accordingly. For example, a young organisation may value novelty and growth, whereas a mature one may think highly of formality and steadiness. Some of these old and new values may be in opposition to each other. Based on this premise, competing values are aligned into clusters, and each 'value model' is identified in relation to a stage of the cycle in the theory. Management should anticipate and determine which 'value model' is to prevail.

The essence of this approach is firstly to acknowledge that evaluation is highly value-laden, and secondly to accept the diversity of values by which organisational effectiveness is judged, and its changing nature over time. The idea seems to be useful for museum management. The dimensions of competing values for museums' strategic management could be conceptualised for our purposes at a slightly different level from the model's

suggestion. The following may serve as examples: preservation vs accessibility (in other words, collection care vs public service); access vs excellence (a perennial conflict in cultural policy); the number of users vs the composition of users; local and regional popularity vs national and international reputation; and entertainment vs education. Stakeholders often have different sets of values encompassing these categories, and these values can change over time; the relative importance of different stakeholders perceived by the museum does not remain the same all the time, either.

The task of fully developing a cluster analysis specifically for museums must be left to another paper. However, one advantage of this approach is clear: identifying value clusters can absorb the effects of individual changes in stakeholders' interests. It will also integrate the same values held by different stakeholders into manageable groups, and shape policies in line with the dominant value cluster for organisational effectiveness. Thus, the analysis will allow the museum engaged in this exercise to identify in which direction overall expectations from different quarters are pointing. In this way, it will enable the museum to 'de-personalise' individual stakeholders and overcome one of the problems in the stakeholder satisfaction approach, ie the dominance of one particular group and the danger of being dominated by it.

Measuring 'success', or organisational effectiveness, thus goes beyond the simple model of strategic management. The introduction of alternative theories on organisational effectiveness has helped to explain the limitation of the Rational Model of organisation, which is still the dominant theme delivered through practical guides and conference speeches on museum management. The alternative models are not without problems. At any rate, no consensus has been reached in the academic literature, with the exception of an acceptance that effectiveness evaluation cannot be unitary because the organisation is conceptualised in different ways by different theorists (Cameron and Whetten 1983). This attempt I have made to introduce alternative models of organisation needs to be substantiated by further research in order to confirm (or deny) their relevance to museum management. Practice is much more complicated, and a tentative conclusion I would provide here is to recommend the practical yet insightful suggestion of Kanter and Summers (1987). As they see it, good management will probably draw on many of the approaches I have outlined and will synthesise them. For example, a well-written corporate plan will be a powerful tool for a museum in stakeholder management. A stakeholder analysis will help the museum to spot a new opportunity it might otherwise miss, or to recognise an emerging value across different constituencies, to which the museum should respond. By setting out the vision in a plan, acquiring external resources

in an unplanned way is likely to lead to positive developments, rather than to a negative 'goal deflection'.

Conclusion

This chapter has discussed some of the reasons why the strategic management model recommended to the museum sector at present does not work particularly well in practice. One factor is the museum's reliance on external constituencies for various resources. This suggests the importance of stakeholder analysis, something which has been missing in museum management literature. The second reason is the difficulties associated with performance measurement in museums. In the last section of the chapter alternative theories on organisational effectiveness have been introduced. It has been suggested that the Goal Attainment Model should be applied to museum management together with other models.

Chapter 9. Knowing the Public—A Research Agenda

Introduction

Chapter 5 has discussed the changing attitude of museums towards incorporating marketing orientation into management, by trying to understand visitors' needs and expectations and to respond to them. I have pointed out several issues that inhibit the development of marketing as narrowly defined, among which is the general lack of information on visitors on the part of many museums. In fact, however, information on visitors is the very first resource museums need to obtain in an attempt to develop marketing. Lack of this in itself testifies to the lack of interest in marketing within the museum sector. This chapter delves into this issue in much greater detail.

Inappropriate knowledge about the market or the general public—whether visitor or non-visitor—is mirrored in some of the views expressed by the museum community. The following statements are representative of the usual advocacy which focuses on the positive part of the whole picture, but they need to be examined carefully in parallel with the less optimistic part:

Good museums are indeed popular. They have a universal appeal....In fact more people go to museums each year than go to football matches and the theatre combined—some 74 million in 1990.

(MGC 1992, p9)

The potential market for museums and galleries is growing and will continue to grow into the next century.

(Morris 1991, p2)

In other instances, normative expressions in relation to visitor services are found:

Museums have to cater for visitors of all ages.

(Museums Association 1989)

Museums have to be attractive in terms of the value they offer for the time and money expended on the visit, and in every aspect of what they offer.

(MGC 1992, p35)

Museums and galleries must rise to the challenge of integrating the needs, strengths and delights of their publics into all areas of their work.

(Hooper-Greenhill 1994, p5)

While statements such as these would prevent museums from being trapped into a number crunching game, as mentioned in Chapter 8, the meanings of such frequently-used words as 'experience' and 'needs' and how museums are to work to these ideals are not specific. This

would suggest that although museums have come to realise the importance of marketing orientation, their understanding of the public is still relatively undeveloped. As was mentioned in Chapter 2, the museum sector had until recently known very little about the market potential for the industry as a whole. Davies's report (1994a), mentioned in 2.1, Chapter 2, which synthesises a large number of existing research surveys and statistics and presents a fair overview of the market, must have been a long-awaited work for the sector. Some of the findings may have challenged the simplistic views cited earlier and confronted museum managers with the harsh reality of the market. For example, the report defies the "commonly accepted wisdom...that [museums and art galleries] are popular institutions whose popularity has constantly increased over the past twenty years" (p39). In surveying various statistics, Davies concludes that "growth in demand (as measured by the total number of visits) has been very modest" and "generally the market is closer to stagnation than buoyancy" (p47).

In recent years, attention has started to be drawn to the paucity of 'qualitative' information on visitors and visit:

Art museums are notorious for precisely this lack of attention to the needs of their audiences....It is time for art museums to shift the emphasis from quantity to quality.

(Hooper-Greenhill 1993, p80)

Some research has focused on the attitude and perceptions of people who fall into one of the many groups that are unlikely to visit museums. This generates qualitative as opposed to quantitative data.

(Hooper-Greenhill 1994, p60)

For a gallery, marketing is not simply about numbers of visitors. It is about quality of experience.

(Macgregor 1990, p6)

The adjective 'qualitative' may sound less mechanistic and more credible; hence its blanket usage is gaining popularity in the museum world. However, the usage is imprecise. Firstly, 'qualitative information' tends to mean wide-ranging things: for example, people's motives for museum visiting and perceptions about museums. Thus, it encompasses cognitive and affective information on museums held by the general public. Secondly, the adjective tends to create a close association between the former kind of information (eg motives/reasons for visit, images of museums) and the research methodology whose result often draws upon informants' verbatim reports but not upon aggregated statistics. It must be noted that 'qualitative' information, motives for visit for instance, can be obtained through a quantitative study. The question is not so much the research methodology as the variety of qualitative aspects of museum visitors and their visits of which museums should have a better understanding.

Such confusing and ambiguous usage of the term alone would suggest an under-developed state of knowledge regarding museum visitors: museums are unclear about what people think of them, what visitors expect from a visit and what they bring back with them after a visit. In the light of this, the last chapter of Part 3 will classify a wide range of research questions on visitors and visits. The purpose is to identify the gaps and lay out a research agenda. The starting proposition of this chapter is that it is only recently that museums, and art galleries in particular, have started to give priority to serving the public, and they still lack understanding of visitors' needs and experiences, as Wright (1989) among others has pointed out. While recognising the importance of other kinds of relationships between museums and people (eg answering public enquiries and assisting scholarly research), for the purposes of the discussion in this limited space, this chapter is focused on visits and visitors of museums in the most conventional sense.

Information on visits has at least four aspects, which sometimes overlap and are inter-linked. Marketing terms are useful here for the sake of presentation. The first category of information is about the 'market', or demand estimation. The key intelligence required is the visitor's and non-visitor's descriptive profile. This is what is often called 'quantitative' information. The information encompasses more than simple demography, as will be shown in 9.1. The second aspect is 'decision to buy', or the pre-visit phase, which will be discussed in 9.2. It is concerned with a number of stages in decision-making by the public about visiting a museum. The third and fourth aspects, developed in 9.3 and 9.4, will paraphrase what Jenkinson (1993, p92) says:

Museums should put a great deal more energy into researching the quality of the museum visiting experience....extraordinarily they [museums] know very little about what their visitors take away with them".

These aspects are less often found in conventional marketing research, but need to be taken on board in a management with customer orientation. More specifically, the third one is about the 'use of product'. In museum terms, this is to enquire into what actually happens to visitors and how they behave and respond to the museum during the visit phase. It will be followed by 'post-consumption', or the post-visit phase. Each of these four aspects entails detailed research, much of which will help marketing planning.

9.1 The 'Market'

9.1.1 Description of Current Visitors

Describing the current visitor profile is the first step and the most traditional type of marketing research that museums have carried out through various means. Many museums conduct 'exit' surveys by asking questions of visitors as they leave. This type of survey would engage a designated person—a commercial researcher, a member of staff, a volunteer or a student on placement—who would compile a questionnaire and produce a report. On a less systematic but more continuous basis, museums would ask visitors to fill in a questionnaire sheet and leave it in the box provided if they wished to.

The quality of information notoriously varies from one report to another, so does statistical validity. Consistency is rare within individual organisations as to the timing of research and details such as the sampling size and the questions asked. The rather amateurish nature of 'local' research, which individual organisations carry out on their respective visitors (as opposed to national research on the general population about cultural participation), has been well-documented by those academic researchers who have reviewed the available reports: in the US by DiMaggio and Useem (1978), in the UK by Davies (1994a, pp8-10) and internationally by Schuster (1993). Nonetheless, for individual organisations the research should be of some value. Only by accumulating knowledge continually through various methodologies, even including casual observation, can they come to have a better understanding of their visitors.

Visitor profile is most typically analysed by their demographic characteristics, such as age, sex and race. Educational and income level, and the distance of visitors' residence from the museum sites can be included here, though these are not strictly speaking demographic data. Such information is relatively straightforward, and easy to collect and assess in numerical terms. It may well be cross-referenced with other aspects of cultural participation such as: (1) extent or rates of participation (eg how representative visitors are in comparison to a certain community), (2) intensity of participation (ie frequency of visit), (3) content of the activity (ie what a visitor specifically does during his/her stay in the museum), (4) context or circumstance of the activity (ie with whom, at what time during the day a visit is made) and (5) attitudinal dimensions of participation (ie motivations, perceptions etc, which will be explained in 9.2 in this chapter) (Zuzanek 1985, p193).

The research helps identify the core visitor group and the non-visitor groups, the knowledge with which marketing plans can become more focused. With regard to museums' social objectives, this information can shed light on their representativeness and relevance in the

whole population of the area. The education and income levels, separately or combined, or class in Britain, are often highlighted for this very purpose. It is often the case that the socio-economic class of a visitor, and the level of educational attainment in particular, strongly correlates with the habit of visiting.¹

Davies (1994a) and Middleton (1990) single out children aged under 16 and tourists as often the most numerically significant group of visitors (even when group visits are taken into account). In other words, one of the most popular visiting patterns is that families come to museums, not particularly for educational purposes but as a day out or part of their holiday. A small-scale case study on children's visiting pattern (quoted by Davies 1994a, p55) suggests that many of them are with their peers (siblings and friends), simply to "pass time" (quoted by Davies [1994a, p55]). The fact that these have been especially highlighted by the two authors and others in recent years implies that museums in the past might have not noticed the volume of these visitors altogether. Or they might have assumed otherwise, romanticising the bulk of visitors as cultural enthusiasts. They may have thought that most people are local, serious and intentional about their visit. The point is that it will be necessary to segment the clientele according to the degree and the kind of their interest, and identify the visitor group for whom a museum visit is a cultural focus and the group whose visit is part of something else.

9.1.2 Prediction of Visit

For performing arts (and in North American) marketing, research has been advanced since the 1970s from the simple description of current attenders to more analytical categorisation of them, or segmentation of the market. The following discussion in this section devotes some length to some of the research findings, mainly from marketing research on North American performing arts. They may or may not be applicable to UK museums. My aim, however, is to introduce the range of research questions and points, and show what is missing in the sector we are looking at.

Belk and Andreasen (1982) have presented one of the most illuminating theories in this respect. They contend that family life-cycle is the key explanatory factor (as far as performing arts attendance in the US is concerned), since it is integrative of age, income and employment status for individuals. They also argue that life-cycle can reasonably predict

¹ A common pitfall here, however, is an assumption that education makes one a visitor. The correlation does not automatically mean a causal relationship as well. It must be interpreted in an analytical framework whose purpose is to trace the causal links (Evard 1987, p194).

leisure pattern, because available time and the types of general leisure activities each segment group can choose to be engaged in are shaped by the stages of life.

Research of this kind examines other relevant factors and their dynamics which have the power to explain and predict arts attendance patterns (Bamossy 1982, p37). Some have looked at the relationship between arts attendance and other activities. For example, the arts funding system in England (eg the Arts Council and the Regional Arts Boards) has an analysis of the correlation between arts attendance and the consumption of other products or services (Verwey 1992 quoted in ACE 1994). Based on a study in four Southern cities in the US, Andreasen and Belk (1980) incorporate such variables as leisure-time use patterns and general life-style tendencies into the usual socio-demographic data. This statistical analysis is aimed at finding predictors of attendance patterns.

Interesting points have been noted as to the relation between the arts in the electronic media—recordings, radio, broadcast television, cable television and videocassettes—and live performance (Waterman et al 1991, p91). They argue that while the media clearly extend the reach of the arts to those who have less access to live events due to geographic, economic or other reasons (eg presence of young children in the family), there is weak evidence of substitution. In other words, those people facing obstacles do not take advantage of the media. Belk and Andreasen (1982, pp31-32) however emphasise the role of the media for the arts attenders who are tied up with family commitments in their life-cycle. The media (eg recorded music, broadcast play) help sustain their interests, to be revitalised when opportunities become more available. Andreasen (1991, p39) similarly argues the function of the media in promoting an occasional attender to a frequent one.

In a similar vein, arts education and early socialisation in culture have attracted attention in academic literature. Research interest has been stimulated to explain the well-perceived pattern of arts attendance in which educational attainment seems to be the most decisive attribute in dividing arts attenders and non-attenders. Bamossy (1982) was one of the pioneers in this area.

As I have noted, the above studies have been mentioned with the aim of presenting the breadth of research elsewhere. Similar research needs to be developed specifically for the UK museum sector in the near future. There are yet more variety in audience studies across the Atlantic, and these deserve to be outlined for the benefit of marketing research for this sector.

The National Endowment for the Arts (NEA), the federal agency for supporting the arts in the US, funded nationwide surveys on arts participation in 1982, 1985 and 1992, as well as commissioning a series of research on specific issues (eg DiMaggio and Ostrower 1992; Cherbo and Peters 1995; Gray 1995; Peterson et al 1996; AMS Planning & Research Corp 1996). Many of the monographs are illuminating, leading to a number of policy implications in addition to marketing suggestions. For example, arts education receives special attention as a determinant in arts participation in one of the reports, written by Bergonzi and Smith (1996). They define 'arts participation' as the consumption of reproduced/live arts and the production of arts and question whether arts education reduces or eliminates observed gender, ethnic or socio-economic status differences in arts participation. For Morrison and West (1986), 'exposure to the arts' in one's childhood is too broadly-defined as an influencing factor for arts attendance in his or her adulthood. They conclude in a study conducted in Ontario, Canada, that child participation in the arts (as distinct from child attendance) is most important in determining new demand for performing arts.

There are others who conceptualise the importance of child socialisation and education in general as 'cultural competence'. This is related to the French sociologist Bourdieu's theory on 'cultural capital': the ability to locate arts works in the right context for appreciation and to decode various messages contained in them, which is inherited in the family socialisation process and learned through formal education.

For example, in a study in the Netherlands, Ganzeboom (1987) concludes that a person's cognitive abilities, which enable one to enjoy culture and the arts, affect the level of his or her cultural consumption. Other factors of influence are identified as status motivation, time budgets, supply of opportunities and financial budgets, in order of importance. The author confirms a similar finding in a cross-national study (including the Netherlands, Hungary and the US) that formal education is the most decisive factor for cultural participation, followed by cultural socialisation and a high cultural status of the occupation (as opposed to a high economic status) in all the three countries (Ganzeboom 1989).

Seeing that most audience studies tend to be static, Ryans and Weinberg (1978) call attention to the dynamics of consumer behaviour, namely, to the study of "how the audience is acquired, how the audience's degree of involvement changes over time, and the factors influencing these processes" (p89). Andreasen (1991) categorises people into six different 'stages' in terms of interest in and attendance at performing arts events. He identifies socio-economic features as well as life-style (eg general leisure activities and family life-cycle) of

each group. The premise of the research is that an audience is developed through the gradual progression of stages, from complete lack of interest to extensive involvement; the research aims to identify discriminative factors between adjacent stages.

In contrast to such a range of sophisticated research, mainly in the performing arts sector, particularly in the US, museum visitor research in Britain is far behind. Target groups according to life-cycle (eg youth or family groups) beyond school parties or tourists have begun to be talked about only recently. Middleton's (1991) reference to a typology of the British population based on life-style and values, developed by a marketing consultancy, is one of the few which employs such an approach to segmenting the market. He suggests that one specific group (named 'inner directed') over the rest of the two ('sustenance driven' and 'outer directed') should be the target for museums, and describes its features. However, since the labels are invented for general values and life-style, little implication is present beyond the group's features and the prediction that it is growing in proportion to the others. A museum specific study which cross-references visiting patterns and life-styles, along the lines of Andreasen (1991) already introduced, would be much more convincing and useful. A properly-designed study can predict patterns of behaviour for certain groups of people, which will be useful for marketing and planning in the long-term. If, for example, research suggests that lecture attendance at museums is the major factor which differentiates a frequent visitor from an occasional visitor, there is much to commend investment in lecture series so as to speed up the commitment.

As has been noted, the outlined research findings need to be adjusted for interpretation in the European museum context. In many cases, research along similar lines will need to be generated specifically for the context. The point here is that the UK museum sector is not informed about its audience to the same extent as in the above studies.

To recapitulate what should concern museums in the UK, the following issues (my translation of Ryans and Weinberg [1978, p89] into our context), need to be addressed in marketing research:

1. acquiring new audiences
2. maintaining current users and encouraging more frequent and diverse usage patterns
3. regaining former audiences, for which identifying inhibitors may be of particular use.

Further issues illustrate the relative paucity of information on museum visitors and predictors for their visit. The correlation between attendance at performing arts events and museum

visits has anecdotally been said to be positive, but not well-researched (except for the evidence given by Merriman 1991, pp72-73). Neither is the correlation between amateur artists/scientists and museum visitor groups known. Even worse is the degree to which museums know about visitors' participation in other visual arts and culture. The Target Group Index (TGI), a large-scale marketing survey conducted annually by the British Marketing Research Bureau (BMRB), contains information on arts participation by the general public, including visit to art galleries and exhibitions but not museums of other kinds. Are frequent visitors to museums also interested in architecture, fashion and design in contemporary settings as opposed to in glass cases? Is their television watching pattern positively or negatively correlated to museum visiting? If there is any relationship established in the above enquiries, how can it be explained? Answers to these questions will shed light on how non-museum culture can stimulate visits, or sustain people's interests in museums. They can, furthermore, explore the possibility of cross-fertilisation between different visual media and interests, and popular culture and museum items.

9.2 Pre-Visit Phase—Decision to Visit

In marketing, it is known that people move through different stages to make a decision to purchase, or to make a visit to a museum, such as:

1. unawareness
2. awareness
3. knowledge
4. liking
5. preference
6. conviction
7. action to purchase.

(Moyer 1994, p271)

Action to purchase is influenced by time and money budgets, and accessibility of the service.

While all of these stages deserve research, motives (and reasons) for making visits constitute one of the most popular research topics among museums. This topic is broadly related to stages four to six in the above model. The depth of questions in this area varies from one survey to another. Davies (1994a, pp65-67), in integrating a number of surveys on museum visiting, lists the following under the heading of 'why people visit': (1) a day out with friends or family, (2) education, (3) special exhibition, (4) an enjoyable experience and (5) just

passing and others. These may not necessarily constitute the options to choose from in a particular questionnaire, but are likely to reflect typical ones. Strictly speaking, there is conceptual confusion among them; they are related to different stages of decision-making. For example, whereas (1) is about the context of a visit, (4) implies the evaluation of a previous visit made by a visitor and (5) refers to what prompts a visit, regardless of the interest/disinterest a visitor originally has in a museum. Perhaps such looseness is tolerable and of necessity, since a conceptually rigid questionnaire would make answering more time-consuming and tedious, thus militating against the value of obtaining information.

In recent years, research on the profile of non-visitors and the reasons why they do not come, which addresses stages one to three or four in Moyer's model, has become more wide-spread than before. This type of research is often carried out through focus-group interviews; hence it is part of what is frequently called 'qualitative' study. It often reveals poor images of museums, such as 'boring', 'stuffy', 'static' and 'un-welcoming' (Davies 1994a, pp69-70). There had been a simplistic assumption that museums are unable to attract certain groups of the community because of their stuffy and élitist image, and if only the image changed, then people would come. Sociologists however have sometimes referred to the concept of 'cultural capital', arguing that people's attitude to museum visiting is determined at a more structural level, formed and reproduced through generations within the family (eg Bourdieu and Darbel 1969).

Yet it has always been the case that some people claim they are genuinely uninterested. The problem is to decide whether a museum should try to persuade them. One can argue that trying to change their mind would be too idealistic and costly. There seems to be a strong belief, however, in the museum sector that "if persuaded across the threshold of a museum, most people find something to interest them and make a visit worthwhile" (MGC 1992, p33). As a social objective, furthermore, a museum may feel it imperative to try to reach and convert non-attenders, at the risk of being accused of a patronising attitude.

The above issues have not touched upon one of the decision-making stages, that is, unawareness. Many people do not know of a museum's location or even existence, even when asked just around the corner from it, and this is one of the significant reasons why people do not visit (Davies 1994a, p69). People with different interests have different cognitions of a town plan, and mere physical exposure to a building or a signpost does not establish a place in people's minds. Something needs to click, which is why 'word of mouth'

stays an effective tool of communication and the most powerful source of information (Davies 1994a, p68).

As has been mentioned, research has only just begun to address specific stages of the decision-making process. The dearth of information on how to stimulate people from one stage to the next is equally deplorable. A short article by Diggle (1995) in the *Museums Journal* is one of the few which touch upon this issue of demand stimulation. The author, an expert on arts marketing, suggests some advantages of charging for admission at museums. For example, museums can prompt visitors to buy tickets in advance by hinting at a limited supply, an idea deriving from his analogy to the purchase of tickets for performing arts events. While it may be an interesting idea, this needs testing in the museum context. Questions to ask are numerous: do people come to a museum spontaneously or in a more planned way? How much in advance do people plan to visit a museum? How often do people who have interests in temporary exhibitions miss an opportunity to see them because they forget? Does the pattern differ between regular and non-regular visitors or according to their life-styles?

This information, when obtained, will help museums with marketing and programming, for example, in deciding the length of temporary exhibitions. It will also be useful in deciding the timing for the distribution of posters and leaflets for temporary exhibitions. If research shows, for example, that most people are spontaneous about temporary exhibitions, there is little point in hanging posters and banners much in advance to announce forthcoming events.

9.3 ‘Use of Product’—During the Visit

9.3.1 Patterns of Behaviour during the Visit

It has been said that museums have become more aware of the need to cater for visitors’ needs, and have started to review current practice, by examining signage, litter bins, chairs,

toilets, water fountains, the café, the staircase and so on (eg MGC 1992, p9). Generally speaking, however, individual museums tend to lack information on visitor orientation—the extent to which they read signage, labels and panels, and move accordingly—because the museum staff are all too familiar with the architectural plan.

McManus, a communication consultant, has made an in-depth study of visitor behaviour in the exhibition environment, by observing the degree to which visitors interact with exhibits at the Science Museum and the Natural History Museum in London. To summarise the findings at the two venues, she argues (McManus 1991) that more people than might be expected read labels and texts to make sense of exhibits, though differences exist between types of visitors: male ‘singletons’ (visitors on their own) tend to be thorough, couples are also likely to read comprehensively, whereas adult social groups are rather rapid browsers.

In fact, dating from the 1920s up to the 1960s, so-called behaviourism had prevailed in researching this area, and rules of thumb such as the ‘right-turning’ tendency of visitors had been common. Research methodologies have developed since then which present alternative views to behaviourism which has a mechanistic understanding of human beings (Lawrence 1991). It seems, however, that the public service orientation of recent years necessitates the revival of this issue to produce empirical studies, which should guide research in individual organisations.

9.3.2 Patterns of Cognition, Learning and Appreciation

While most museums today would claim they wish to enhance visitors’ experience during their visit, it is not very clear what ‘experience’ might mean and how in concrete terms it can be improved. It is already clear, however, that simply presenting an excellent, quality exhibition and expecting it will speak to visitors would not work. The following comment, made by a museum sociologist, to summarise the paper of a Museum Studies lecturer at a conference, looks surprisingly simplistic:

...the museum should try to draw in a new public at least at first by giving them what they want. Unsophisticated they may be, and unlikely to exercise a high level of cultural competence in the ‘fine’ arts on their first go around, but the quality of their visit may make them regular and more sophisticated participants over time.

(Zolberg 1993, pp150-151)²

What is still missing is knowledge about the pattern of visitors’ encounters with an object or an exhibition. As Miles (1993, p28) notes, there is however an encouraging sign that museums are shifting their attention from how best they should deliver messages to visitors (eg in Miles 1988) to what people make out of a visit. The pattern can be wide-ranging from mere perception, cognition, understanding, learning to enjoyment. This, however, is most

² The reprinted paper by Hooper-Greenhill (1993), which Zolberg summarises, does not have any expression like this quote, apart from its title. From the publication, it is difficult to tell whether this is a view which belongs to Zolberg herself or to Hooper-Greenhill.

difficult to uncover. As McLean (1994, p202) sees, the concept of the ‘experience’ is not adequately explored in services marketing in general, nor in museum research.

Hirschman (1983) and Semenik and Bamossy (1985) discuss the limitation of conventional marketing research in this area. One of the major reasons for the difficulty is the nature of the ‘product’ itself (ie consumers’ experience), which the authors define as being:

1. Abstract
2. Subjectively-experienced
3. Unique
4. Holistic—(Artistic) products are realised and encountered as wholes
5. Non-utilitarian—(Artistic) products are valued for their own sake without regard for any extrinsic function they might perform

(Hirschman 1983)

6. Common Good.

(added to the above by Semenik and Bamossy 1985)

These attributes identified for experiencing the arts (which the two papers are concerned with) are largely applicable and suggestive to our interest in unpacking the amorphous notion of visitors’ experience in museums and galleries. Museum visiting and encounter are therefore distinct for marketing purposes from commercially manufactured products, though each feature may be relevant to different types of museums to different degrees (eg science and history exhibits may have less abstract messages than art). Given these attributes of artistic (and cultural) experience, Semenik and Bamossy (1985) argue that “the available methodologies of marketing research suffer serious failings” (p29) in an attempt to discover the value of experience as perceived by consumers. What a museum offers is a service which is produced and consumed simultaneously, and consumed by users’ participation in it. Also this ‘product’ is holistic, in that the quality of a visit is affected not only by that of the exhibition but also by a host of other factors, for example, the museum’s physical structure and the facilities it offers (McLean 1993, p18). Even the encounter with an exhibition alone involves “artistic, intellectual, and emotional response that is holistic in nature” (Semenik and Belk 1985, p29). Therefore, defining the product itself and extracting particular elements which have affected consumer satisfaction are extremely difficult. This is why vague questions such as ‘did you enjoy the visit?’ are often used in questionnaires, although a high percentage of ‘Yes’ or ‘No’ cannot tell what is good or wrong about museums with any substance.

The second reason for the limitation of conventional marketing research is that, by the same token as the first reason, visitors would have difficulty in expressing their responses. Unlike many manufactured products, it has been said that museum exhibitions often require cultural competence in order to understand, make a response to and enjoy them (eg Wright 1989): people need to have ‘consumption skills’ (Schitovsky 1976).

These marketing research problems by no means rule out the value and possibility of having a better understanding of how people appreciate artistic and cultural presentation in museums. Reflecting on the unique characteristics of cultural consumption, marketing academics indeed started to explore alternatives to the concepts, research models and survey methods which are used to study ordinary consumer goods and services (eg Holbrook 1987). With an emphasis on ‘experiential aspects’ in the consumption of artistic products and cultural events, a study called ‘consumer aesthetics’ has emerged. It is a study which tries to understand the nature of a cultural encounter, which will subsequently predict future consumption patterns.

Such orientation is well-represented in another new study area with a specific focus on museum and other cultural sites visiting, which has come to be called ‘visitor studies’. The study’s origin is related to the practice of ‘evaluation’: referring to an examination of the expected educational effects on visitors caused by a permanent or temporary exhibition. Research topics in this study area are however not confined to visitors’ responses to exhibits, but they include such aspects as visitor commitment and motivations, which have already been discussed in 9.1.2 and 9.2 of this chapter. As far as academic researchers are concerned, it has involved a variety of disciplines such as anthropology, sociology, psychology and education (Bicknell and Farmelo 1993, p7). As to museum disciplines, science seems to remain the focal area of the discussion, though not exclusively, and the practice has been particularly advanced among science and natural history museums. This is partly because sciences often have clearly definable, factually-based knowledge to convey.

One of the most important research topics in visitor studies is the relationship between museums and people’s learning. A recent DNH report (Anderson 1997) addresses the issue of museum education. This is the most comprehensive report of its kind in the UK, identifying targets for its development in individual museums and beyond (ie the formal education sector, and regional and national frameworks for museums). The report contains a premise that the societal need for museum education is increasing and highlights structural issues to be tackled in order for the need to be met. However, theories of cognition and learning, which relate to even more fundamental issues, are only briefly mentioned (pp4-5).

In order to make recommended actions more effective if they are to be implemented in practice, it is important that the museum sector benefits from research on the patterns and processes of learning.

There is much to be derived from education theories and life-long learning already. These theories need to be adapted to reflect the characteristics of museums such as being an informal setting for learning, object-based rather than text-based. Use of Information Technology has become fashionable in exhibition design in recent years, but interactive devices do not always guarantee visitors' understanding. Friedman (1993) provides interesting examples where science exhibits have proved to be ineffective in delivering intended messages of scientific knowledge, although they involved visitors' participation and use of sophisticated technology. The effectiveness of different media for communication such as lecturing, gallery talk, interactive devices, panels, catalogues, audio guides and so on in the museum setting needs more research. McManus (1994) draws attention to the importance of group dynamics in learning at museums, families with children in particular. People learn effectively by fitting new information into pre-existing cognitive schemata (Uzzell 1993, p127) and by continually broadening and deepening their existing knowledge (Bruner 1960, pp17-32). Educational aspects of communication between museums and visitors therefore need to be developed in accordance with people's age, educational level, knowledge, interests and cultural backgrounds.

Challenges to a traditional 'educationalist' mission in museums have been presented by two German scholars, Treinen (1993) and Graf (1994). They basically see museums as similar to mass media, in relation to audience behaviour: a view inferred originally from a research project at a German science museum. Treinen argues that "the majority of visitors are driven less by interest in the subject, let alone by the desire to learn or educate themselves, but rather curiosity and the pressing desire for diversion" (p89). This type of behaviour is typical of television viewers, who are un-purposeful and constantly seeking stimulation, demonstrated in their 'channel-zapping' and their readiness to allow, or willingness to have, frequent interruption (pp89-90). Graf (1994), Treinen's research colleague, similarly argues that museum visitors do not necessarily want to learn or study in a structured, systematic manner. They "move around, guided by the attraction of single highlights, or extrinsic elements of the exhibits, as well as by their own interests and background" (p79).

Coining such behaviour as 'artistic laziness', 'cultural window-shopping', and employing the term 'active dozing', the two authors may have provoked the museum profession. While they

may even be insulting to museum experts, as they acknowledge (Treinen 1993, p90), they do offer instructive information and a practical suggestion that labels and panel texts should be structured like an article in a newspaper, with headlines and short summaries of the content (Graf 1994, p79). Their papers may also encourage museum educators to give serious thought to differences, if any, between the behaviour described for the majority of visitors and regular participants in various educational activities at their museums. The consideration, if made, will help to extend the current education theory and practice beyond the core loyalists.

As has been mentioned before, ‘visitor studies’ as described above have been developed in terms of research and its application particularly in science and natural history museums. Art, archaeology and history are in this respect relatively behind. One of the reasons for this gap is related to the nature of the disciplines: the former group tends to have definitive messages of facts for which objects are instrumental, whereas in the latter, artefacts and objects are arguably ends in themselves. Artefacts are supposed to have intrinsic value in their own right, open to different interpretations. Fine art is particularly subject to this tendency. Such difference in the nature of collections is in turn reflected in the subcultures of disciplinary curators (Zolberg 1993, p25). Cossons (1991) sees this division as being linked to “deep-seated cultural prejudices” (p17); Spalding (1991) describes the attitudes of art curators in a critical way:

Art museums are often like the front rooms of the rich—traditional or modern oils on the walls, ornaments on shelves, antique furniture and oriental rugs—used for special entertaining, where children aren’t allowed”, and “the one thing you don’t need in your sitting-room is labelling; the items there needs no interpretation for you and your friends...they [art museums] assume familiarity (pp167-168).

The problem with art galleries is not only their implicit assumption that visitors are familiar with what is exhibited. It is also the traditional belief in the self-explanatory power of art works (Vergo 1989, p48) and a corresponding lack of interest in and understanding of how visitors respond to art (Wright 1989). This is the issue which the rest of this section is devoted to exploring, because “what is really important for museums is to discover what is going on in the minds of the person that is looking at a work of art” (Spalding 1993, p96).

The importance of an aesthetic theory to explain experiential consumption and the process of reception in art has been recognised at least by academic commentators (eg Semenik and Bamossy 1987; Zavala 1993). They have attempted to unlock the conventional wisdom that artistic encounters are highly emotional, affective, subjective and simply inexplicable by scientific research.

The paper by Semenik and Bamossy (1987) is written in the context of marketing research evolving into consumer aesthetics. The distinction made by the authors among aesthetic responses, preferences and judgements provides a helpful framework as a starting point. Our purpose is to begin to understand the process of what is often referred to as the visitor experience, particularly in art galleries. According to the authors of the paper, 'responses' are an immediate reaction to an artwork with varying intensity and continuity, and hence highly subjective. 'Preferences', whether one likes the work or not, are likewise subjective. Judgement, in contrast, is one's evaluation of an art work itself, determined by cognition and objective information. 'Experience' thus comprises interactions between objects and audience, which are various in terms of affective, cognitive and intellectual depths involved.

Parsons (1987) gives an account of how people come to make sense of art, by using a cognitive developmental theory, a well-known approach in psychology. According to him, the kinds of 'ideas' people use when shaping responses to a painting are related to the attributes of the work: the subject matter, emotional expression, the medium (the form and the style) and the nature of judgement. These are closely related to the five stages of cognitive development in art. Stage One is simple favouritism, based on intuitive response and a freewheeling association of the subject matter of a painting to whatever a viewer can relate to. This is typical of young children's responses. Parsons gives an example of a four and half year old girl liking the Renoir picture shown to her because of the dog in it.

Beyond that stage people start to make sense of a picture in terms of the kinds of subjects that paintings have (eg a man's face), advancing to expression and expressiveness (eg a sense of grief), further to Stage Four which is about the medium and forms of a painting, by placing it in its social context. Finally, at Stage Five, people re-examine the concepts and values with which a painting is authoritatively associated. The judgement made at this stage is the self-conscious articulation of the meanings of an art work. In short, our capability for visual cognition and understanding proceeds in a reasonably orderly way by acquiring more and more complex patterns of perception.

While Parsons (1987) is mainly concerned with explaining how people understand art on its own terms, this may not be enough; as Zolberg (1986, p185) notes, it has been well-known for a long time that art has non-aesthetic dimensions (eg *inter alia*, Veblen 1925, pp115-166). Wolff (1993) de-romanticises and de-mystifies the notion of art as the creation of 'genius', by showing art as a social product which is "embedded in and informed by broader social and political processes and institutions, with economic forces historically playing a particularly

important rôle” (p139). These sociological writings have contributed to exposing social and political forces playing a role in the *creation* of art, which disguises itself as aesthetic (Wolff 1993, p7). However, we need to know, furthermore, about other non-aesthetic factors which influence the *reception* of art. Belk (1987) has a wider perspective, arguing that people evaluate a work of art by taking into account a large number of factors other than the intrinsic quality of art. He offers a useful theory on the reception process of art, by elaborating on the function between stimulus and response.

There are, according to him, at least six kinds of responses, shaped by the existence of different elements in the organism such as a knowledge of art history. The first response is aesthetic, which is judgement based purely on the intrinsic qualities of an art work (ie style, composition, colour etc). Secondly, following Kulka (1981), he distinguishes ‘artistic’ from ‘aesthetic’ responses. Artistic response is made in relation to the historical context, for example, an art work’s contribution to innovation in technique or presentation. This is exactly what art history and art museums are all about. The third is economic response. As we empirically know, information on the monetary value of an object affects people’s perception of it. Fourth, moral judgement, for example, a sense of obscenity, sometimes influences perception. Fifth, knowledge about the factual or more abstract information which an art work seems to convey influences in the shaping of ‘cognitive response’. The sixth element mirrored in one’s perception is the social category with which an artefact is associated, such as ‘aristocratic’, ‘middle-class’ or ‘popular culture’.

This is a helpful identification of the elements at work which affect the way in which people respond to an art work, though the different responses are often complementary in practice. The classification will be better understood by reference to the popular BBC television programme *Antiques Roadshow*. In its typical plot, an innocent local person brings in an obscure picture, saying he/she likes it and thinks it is beautiful, but knows nothing about it. Then the expert explains its provenance, the painter, the subject matter, the historical and cultural context of the work, for what the picture may originally have been painted and to what sort of people it would have belonged. Finally its current value on the auction market and subsequently the owner’s ‘return on investment’ are revealed, often resulting in comments from the owner along the lines of “How interesting! I like this better now”.

Whereas in the show such a response is expected by, and amusing to, the viewer, in the museum context it would be unlikely to gain warm approval. Belk (1987) sees the problem as being that, although we are often substituting economic and other extrinsically-derived values

for aesthetic responses, we tend to pretend the opposite. The primacy of the 'aesthetic response' seems to be particularly strong in the norm traditionally held by art museums, while they in fact collect and present objects for their 'artistic' quality (ie judged for their art-historical place). As Belk (1987, pp173-174) notes, and museum professionals should know by experience, aesthetic response in practice does not occur very often. It can however, and perhaps should, be aroused by stimulating other kinds of responses.

What I have outlined as theories which explain how people react to and make sense of visual arts may or may not be transferable to the larger context of museums. As mentioned earlier different collections have differing attributes. However, it is hoped that this literature review has contributed to broadening the scope of knowledge which museums of all kinds need in order to effectively serve the public. Also it must be noted that the studies introduced in this section may not be exhaustive or authoritative theories on people's cultural encounters, and perhaps the body of literature remains to be elaborated upon in each field: marketing research, consumer aesthetics, visitor studies and psychology. Nonetheless, by breaking down the ambiguous term of 'experience' into identifiable units, they have provided useful frameworks for further analysis. This clarification, however imperfect it may be, will facilitate further research and evaluation, which would improve the performance of museums in exhibition, interpretation and education.

9.4 'Post-Consumption'—Post-Visit Phase

The distinction of the post-visit phase in this chapter is largely an artificial one for presentation purposes, and much of it has already been covered by the previous section which is about visitors' experience. More specific to the stage of post-visit perhaps is the level of satisfaction and the kind of judgement visitors derive from the visit, factors which will affect their future decisions. Museums need to know to what extent they have encouraged people to come back or not and how to stimulate them to return. This again is not well-known among museums and is difficult to research for the reasons given in the early part of 9.3.2.

The problem mentioned in developing new audience in 5.2.2 of Chapter 5 is relevant here. The projects were successful in building a bridge between the local community or minority groups and the museums, but less so in bringing them into more mainstream museum activities. This challenges a conventional view that the higher the level of satisfaction expressed by visitors, the more likely they are to make a further commitment. Is there a 'technical' problem or lack of information which prevents project participants from becoming

regular visitors? Or are there more structural inhibitors? For example, does the culture presented in the main museums itself remain irrelevant to non-visitors? It may well be possible that the definition of visitor satisfaction employed by museums is too simplistic. As was mentioned in 9.3.2 of this chapter, a museum visit has diverse aspects for visitors. They may judge it as a shared social experience, according to their need for comfort, or as a learning opportunity. We do not yet know the answers to these questions.

Conclusion

In this chapter, I have laid out a range of research topics to be studied by the UK museum sector, by referring to some of the advanced research-based knowledge available for the performing arts sector, particularly in North America. To start with, a better understanding of visitor profile is needed as well as more analytical, as opposed to descriptive, research to predict visits. In order to pursue a museum management policy committed to public service it is necessary for visitor studies to be further developed. If curators are too busy to discover areas of importance to their work other than art history, archaeology, science etc as Wright (1989, p123) critically notes, then references made in this chapter to research in cognitive psychology, marketing research and consumer aesthetics may have made some contribution towards enlarging the debate.

Concluding Part : Summary and Future Issues

This concluding part, summarising the discussion so far and raising future issues, is organised in two chapters. Chapter 10 will review the previous three Parts, followed by a detailed summary of each chapter. Chapter 11 will take a panoramic view of the major findings to see

common themes emerge. Four clusters of ideas, which provide implications for cultural policy, will be identified and discussed to some length. Some issues for further research will also be pointed out.

Chapter 10. Summary of the Findings

This paper has reviewed some of the major effects caused by British cultural policy in the 1980s and 1990s, with particular reference to museum management. In Part 1, the context and issues have been sketched out to identify the external forces which have necessitated the development of administration and management in the museum sector. Part 2 has been a case study, testing out in a particular empirical setting the changing trends in which the museum sector has been operating. Part 3 has employed a wider scope than Part 2, and discussed the issue of museum management from several angles. Detailed key findings of the three Parts are summarised as follows:

PART 1: CONTEXT AND ISSUES

Part 1 has provided the basic groundwork of the paper. It has briefly given information on the UK museum sector. Particular reference has been made to the museums owned and run by local authorities. They constitute the backbone of the UK museum provision network and symbolise civic pride in many towns and cities around the United Kingdom. This section has also examined various changes in the museum sector environment. It has been assumed that these changes have forced local authority museums to change and adopt a new management thinking so as to adapt to the new situation.

Chapter 1. Local Authority Museums

Museums in Britain constitute a diverse, ever-changing sector, which as a whole occupies a major part in the non-commercial sector of culture, as well as in the leisure and tourism

market. Many of the museums owned and managed by local authorities were founded in the Victorian period. They were established with the help of philanthropists and developed through the accumulation of eclectic collections. They are now provided as a discretionary service by local government, and are still heavily subsidised by it.

- Local authority museums are one of the most significant divisions in the sector, in the number of institutions and the regional/local contribution they make to their communities.
- Local authority museums often belong to the Leisure Department of the council. Over time, their status within the local council structure has been downgraded. Also because of the discretionary nature of the service, they tend to suffer from vulnerability and marginalisation.
- Large local authorities often have a number of sites: a main original museum and gallery which is often located in the city centre next to the town hall, and other branch venues. They also support local independent museums with grant-in-aid, and by making available the professional support of the public museum's staff. Altogether, they run the 'museum services'.
- Two of important characteristics of local authority museums should be noted in comparison with the rest of the sector. One is that their governing body is simultaneously the paymaster. Another is that main museums are likely to have multi-disciplinary collections: art, natural history, science, local history and so on. These have implications for museum management.
- Local authority museums with art galleries are at a cross-roads in the British cultural policy network. Their major funders are local councils but their art gallery element can attract funding from arts funding bodies. Thus, they are a meeting point for the two traditionally-disparate funding systems in the cultural sector.

Chapter 2. Environmental Changes and Need for Management

Management became as a pressing issue for museums across Britain during the mid- to late-1980s, and particularly in the 1990s for local authority museums. The drive behind the change is complex. It includes social, political and economic trends, strategies deriving from national and local cultural policies, and forces external and internal to the sector.

- The 'market' for the museum sector has changed on both the supply and demand sides. The growth of independent museums and the leisure industry in recent decades at one end and the rising expectation of the general public at the other end of the relationship have created a different environment for the operation of museum.
- Cultural policy at the national level has in recent decades emphasised the principle of self-help and efficient management, while public grants to culture have been squeezed. The needs for (1) plural funding, (2) customer orientation and (3)

management for efficiency and effectiveness have been identified as central themes in the Conservative governments policy for the arts and culture since 1979.

- Cultural policy at the local level is influenced by that of the centre. Similar arguments have been made to local cultural organisations as outlined above. Income generation, service provision that is responsive to consumers' needs, and strategic management and planning have been stressed.

PART 2: LOCAL AUTHORITY MUSEUMS IN TRANSITION?

Part 2 has used the three strands of policy change identified in Part 1 to examine their impact on cultural organisations in a specific setting. Four local authority museums in the West Midlands region have been examined in detail in each of the three aspects: (1) commercial activities to generate income, (2) marketing and audience development and (3) strategic management. Chapter 3 has provided a brief summary of the four organisations by referring to their history, size, organisational structure, features of collection and programming, and recent development. Chapters 4 to 6 examined the extent to which the four Museums have changed in the three aspects respectively. Reference has been made to available large-scale studies on similar topics wherever possible in order to provide a larger context for the cases.

Chapter 4. The Enterprise Culture—Income Generation

Retail and catering operation has been developed at three of the Museums in order to provide the public with added value to museum visiting, and also to generate income. The profits made from these activities are modest, and the constraints deriving from local authority bureaucracy have often inhibited the enterprise culture.

- Retail has been a difficult area to make a success of in the three Museums. Being a marginal unit in the museum structure, shops have suffered from a range of problems such as insufficient investment and inappropriate levels of stockholding.
- In the three Museums, catering has been contracted out to the councils' own commercial services, as a result of the Compulsory Competitive Tendering imposed upon local government. Museums have generally lost out as a result. They have not been satisfied with the level of service and contractual arrangements, but have been unable to change them a great deal.

- The Museums operate other activities to pursue commercial opportunities wherever possible, but apart from the case of the largest museum, these are far from being a money spinner yet.

Chapter 5. Customer Service Orientation—Marketing and Audience Development

The development of marketing as a set of logistics to increase visitor numbers to the Museums stagnated or diminished in recent years. In contrast, marketing orientation, a philosophy of placing customers at the centre of management, has been taken on board. Prompted also by the local authorities' concern with cultural diversity, the Museums studied have made achievements in the policy of broadening access. These are not exceptional cases but representative of national trends as follows:

- Practical problems in marketing such as a lack of resources and information about visitors have been among the many reasons for the decline, a decline which is shared by many museums in the UK. This also illustrates the degree to which museum marketing remains under-developed.
- Marketing, as interpreted as a guiding philosophy of management which relies on exchange relationships with customers, has gathered momentum, and funding has been made available for this. Improvements have been made in customer care, user-friendliness in exhibitions, facilities to increase comfort and special provision for disabled people.
- Marketing as a philosophy has also started to take the form of audience development amongst local authority museums. The issue of broadening the audience base, which has been a major concern for cultural policy makers, has been revitalised. Imaginative approaches have been taken to address this issue, including audience participation in a variety of museum activities.

Chapter 6. Towards 'Three-Es'—Management and Planning

The four Museums have engaged in the formal exercise of forward planning in the 1990s. In parallel, strategic plans for individual functions have also been drawn up, and the Museums' work has generally been systematised. Performance Indicators are used for specific tasks, but have played a limited role in corporate management. Major developments in recent years are more or less serendipitous and opportunities-driven. These findings suggest the limited usefulness of strategic management in practice.

- Strategic planning has been strongly recommended by the quangos for the museum sector. In response, the Museums have written strategy documents, which they have found useful both in theory and in practice to a certain extent. Various strategies for specific functions have also been drawn up.
- Performance Indicators to measure progress are used for specific operations but not for corporate management.
- The four Museums have been successful in a number of respects in recent years despite the unfavourable environment in which they have had to operate. These positive developments have been shaped by the political climate and a series of events and opportunities external to the museum organisation. Funding from non-traditional sources for the Museums, from Europe, the Lottery and the arts funding system, have had a considerable impact in particular.

PART 3: DISCUSSION—MUSEUM MANAGEMENT

Part 3 has attempted a theoretical analysis of museum management. It has identified problems and difficulties in museum management deriving from some of the distinctive features of the museum as an organisation. It has aimed to make some contribution to a general understanding of museum management, which in turn will signal implications for cultural policy. Chapter 7 has outlined four major characteristics of museums which have bearings upon management. Chapter 8 has furthered the argument of Chapter 6, and examined the extent to which strategic management, with the use of Performance Indicators, is feasible and useful for museums. Chapter 9 has picked up one of the issues in marketing management, namely the dearth of information on visitors on the part of museums. It has called attention to visitor studies and identified research topics.

Chapter 7. Organisational Analysis of the Museum

‘The museum’ as an organisation has been under-researched. This chapter has identified four particularly distinctive characteristics which have implications for museum management. They are (1) tangibility and permanence, (2) the museums profession, (3) heterogeneity in organisational function and goal, and (4) multiple constituencies. All of these point to inherent dilemmas, conflicts and paradoxes in museum management.

- The museum is a tangible and permanent institution of culture, uncommon in the field of culture and the arts which tends to be characterised by intangibility and perishability. While these features offer an advantage in museum marketing, they can become constraints in marketing management. A major disadvantage is that collection care can become prioritised over the public service of presentation.
- The museum is managed by curators, who remain as ‘semi-professionals’, when viewed by the ‘sociology of work’ literature. They have been experiencing a number of changes in their occupation, which has led to a feeling of alarm, threat and strain.
- The museum has a number of functions and organisational goals which are distinctive and heterogeneous. These lead to different directions, values and cultures in the organisation. Reconciliation is constantly required, and increasingly so in museum management of recent years.
- The museum has a large number of constituencies with whom diverse relationships are built. Plural funding complicates the picture. Handling different constituencies has become another challenge for museum management.

Chapter 8. Planning and Evaluating Performance

The standard model of strategic management as recommended to the museum sector has worked only to a limited extent, because the environment for museum management is complex, uncertain, diverse and changing over time. Performance measurement, which is the key to strategic management, is a problem area in practical, theoretical and behavioural terms. Academic literature on measuring organisational effectiveness and related management models have provided alternative views and approaches to museum management.

- Considering museum’s heavy reliance on external constituencies for various resources, strategic management should include ‘stakeholder analysis’. A more realistic management model would be centred around ensuring the satisfaction of these groups.
- It has been said that performance measurement is an essential part in strategic management, but the quality dimension is hard to measure. The use of Performance Indicators poses a range of problems for museums.
- The standard model of strategic management—goal-setting, implementing plans and monitoring progress—is based on the Rational Model of organisation. A brief introduction to alternative views of organisational theory has helped to understand the

complexity and dynamics of museums. The implications of these have also been useful in conceptualising museum management.

Chapter 9. Knowing the Public—Research Agenda

This chapter has addressed the need to improve museum's knowledge about visitors. The scarcity of information, particularly in comparison with marketing research in the performing arts sector, has been made clear in my setting out research areas to be covered. The research agenda has included topics on (1) the 'market', (2) decision to visit, (3) the visit itself and (4) post-visit. Some of the interesting research papers produced for performing arts organisations in North America have been referred to, in order to illustrate the gaps in knowledge in the UK museum sector.

- As to the market, the museum sector lacks research on the description of current visitors, not to mention predictors of visits. One of the reasons for the paucity of information is that museums tend to reject the notion of target groups in preference of universality. Information however is needed to help museums acquire new audiences, maintain current users and regain former visitors.
- Motives for visiting have received attention in recent years. This information could be used for marketing to convert a potential visitor to a regular one. If obtained through rigorous research, it would also help in planning and programming effectively.
- Visitor patterns of behaviour during the visit, styles of cognition, learning and appreciation have not been well-understood by museums. Research studies have been carried out in science museums, but art museums are far behind. 'Experiential consumption' and 'consumer aesthetics' are growing areas of study, which have evolved out of conventional marketing research. This type of research would help museum management to improve its public service orientation.
- The post-consumption phase is related to the visitor's own evaluation of the experience. This is also an important area of research which assists in maintaining and regaining visitors. The chapter has thus concluded by forming a feedback loop, returning to the first area of the research agenda.

Chapter 11. Policy Implications and Future Issues

Chapter 10 of this concluding part has summed up the major findings of Parts 1 to 3. Now it is necessary to step back, take stock and point out future issues for investigation. In reflecting on the objectives of this paper, reviewing the findings and recognising areas that this paper has been unable to discuss in full detail, four themes seem to emerge for further thought. They are related to (1) the delivery of government policy in culture, (2) the impact of government policy on cultural organisations, (3) paradoxes of museum management and (4) consumerism and beyond. The rest of this paper discusses each of them.

11.1 Government Policy on Culture

This paper has illustrated the communication process from government to cultural organisations in Britain as to the way cultural services should be provided, which has changed the practice of cultural organisations to a certain extent. Funding has been an obvious instrument that central government has used in order to influence the behaviour/output of cultural organisations. Lowering the level of funding and expecting changes in management are two sides of the same coin. Directives delivered through the quangos have been another instrument. The MGC Registration scheme has worked to improve standards in museums of all sizes.

If the above is obvious and omnipresent in the cultural sector overall (except the existence of the Registration scheme), this paper has sought to make a contribution to an understanding of the process in which policy articulated by central government has affected local authority museums. In describing environmental changes in Chapter 2, I have related the situation for local authority museums to the national picture. However, what I did not explore at that point is the time-lag between the two scenes, national and local. In fact, the Nationals have been exposed to the pressures for change since the 1980s, whereas for local authority museums the 1990s is the time of pressing change. All the pressures—the hard squeeze in public funding, the introduction of marketing and strategic planning, and the emphasis on self-generated income—only arrived in local authority museums in the last several years. The discrepancy with the Nationals' situation is apparent in Table 1, Appendix B. The Rayner scrutiny of the Science Museum and the V&A of 1982 (Burrett 1982) criticised the lack of clearly set corporate objectives. The equivalent for local authority museums came nearly a decade later with the Audit Commission (1991).

One explanation for the time-lag is that local authority museums have in a sense benefited from being a discretionary service area, which disables central government from interfering directly in it. In the mandatory services with which local authorities are involved, such as education, central government—Westminster and Whitehall—has substantial power to coerce changes through legislation and other means. Unlike in some countries which have a powerful and carefully-crafted network of cultural administration with a Ministry of Culture in the centre, France for example, the DCMS can only promote changes in local cultural organisations indirectly.

There has been an argument that the ‘arm’s length principle’ of cultural policy serves only to disguise and excuse irresponsibility and indifference of government (eg Pearson 1982). Through funding, the argument goes, cultural organisations will be forced to follow government’s wishes to a great extent in any case. The suspicion about the arm’s length principle has been strong, particularly in the relationship between government and the Arts Council (eg Hutchison 1982; Quinn forthcoming); the Arts Council is held accountable to government for the public money it receives and distributes and its members are appointed by government, both of which are the mechanisms which can be used by government to influence the arts.

There is, however, no direct funding relationship between the DCMS and local councils as far as museums are concerned. Indirect funding exists, but very little. For example, small grants for specific purposes are provided to local authority museums by the AMCs which are funded by the MGC, which in turn is funded by the DCMS. Such an indirect and minor source of funding cannot be an effective means of enforcement. This point can be well illustrated in reference to the issue of ‘de-municipalisation’ mentioned at the end of Chapter 4. Only a very limited number of local authority museums have become charitable trusts, despite the recommendation of this option explicitly and strongly made by central government. Thus, it can be said that local cultural policies for museums are generally developed in isolation, which often results in the pluralistic, yet fragmented and patchy nature of the service provision in Britain as a whole.

That said, an implicit assumption in the above needs careful examination, that government policy has been the major factor for changing management in culture. Firstly, a question arises as to whether ‘government policy’ has been consistent and seriously-pursued. Even at the level of discourse, inconsistency and incompatibility are found in the emphasis on the

‘three-Es’, as was revealed in 8.2.2 of Chapter 8. Secondly, a gap is often found between policy rhetoric and its implementation in public policy (Marsh and Rhodes [eds] 1992), which is known as the ‘implementation gap’ in policy studies literature. The implementation gap, or causes of policy failure in effective implementation, may be ascribed to:

1. ambiguous and inconsistent objectives
2. inadequate causal theory
3. failure of the implementation process to enhance compliance because of inadequate incentives and sanctions which are legally structured
4. lack of committed and skilful implementing officials
5. lack of support from the affected interest groups and relevant government agencies, and
6. unstable and uncertain socio-economic contexts which substantially undermine either political support and/or the causal theory.

(Sabatier 1986, pp23-24)

In our case, as has been mentioned in the above, the lack of direct enforcement measures on the part of central government towards local authority museums seems to be most responsible for ineffectiveness in policy implementation.

Thirdly, government policy is only one of many forces working to make changes in management of local authority museums imperative. As has been shown in Chapter 2, there have also been societal, economic and political forces of local government which have affected museums. Considering the extent to which museums are dependent on public subsidy, the importance of other factors in shaping management in culture is noteworthy. These forces are, of course, mutually dependent. Government policy in culture can be seen as a reflection of societal expectations and demands (or not, as the case may be), and the economic conditions of the nation may influence the values and attitudes of society at large. Thus, it is always important to keep a macro view for the totality of cultural policy and to bear in mind that one phenomenon under examination—whether a change or a problem—is often the effect of interwoven causes in the ecology of a whole policy area.

The arguments which I have made throughout this section need more research before they are established, particularly by employing theories from the political sciences and policy studies. To begin with, definitions would have to be given to ‘policy’, ‘government’ and ‘implementation’, something I cannot attempt in this paper. We could examine, for example, the extent to which communication and directives from central to local government take

place, and in what ways.¹ It would also be useful to examine whether a similar gap can be found between national and regional/local performing arts organisations. Another angle for research would be to see if differences originate from the size or the ownership of organisations under the same circumstances.

11.2 The Impact of Government Policy on Cultural Organisations

In examining the relationship between government policy and its adoption in practice, we need to highlight not only the process by which policy is transmitted but also the reactions of cultural organisations to policy. The findings of this paper have suggested a variety of museum sector responses to the three policy directives on which I based my investigation: income generation, customer-orientation and strategic management. Even in the 1990s, local authority museums are not well-prepared to assume aspects of commercial enterprise, because of their organisational structure and size. Local authority museums and the Nationals may have had the same attitude to a policy, if at different points in history, but the outcomes do not appear to be unitary. In other words, the promotion of entrepreneurialism and managerial capacity by government has not always worked universally. This is however only a hypothesis which needs further research into changes of management at the National and Independent Museums. Testing the hypothesis would have two aspects.

Firstly, it appears that government has not understood well the mechanism of management in cultural organisations. It may have seen cultural organisations as an unexamined ‘black box’ into which policy flowed and from which intended effects did or did not emerge (Beyer et al 1983, p227). Such a simplistic assumption is not uncommon in any public policy of any country. However, attention must be paid to “what goes on inside the box in order to understand the effects—intended and unintended—of public policy” (Beyer et al 1983, p228). This is why Chapter 7 was dedicated to an organisational analysis of museums, teasing out their complexities and mechanisms of functioning. It seems that government has made a presupposition (and rhetoric) that plural funding would bring about positive results, such as independence of museums (see, for example, Renton, interview with Wright [1992]), or “self-examination and innovation” (Wilding 1985, p10), but has failed to anticipate more complicated sea changes. It has not taken into account, for example, organisational capacity to deal with plural funding. Government has advocated the virtues of plural funding, but this

¹ Rhodes (1992) is a useful book which provides an analytical framework for understanding this central-local relationship.

has added complexity to museum management, as I have discussed in Chapter 7 in relation to external constituencies. As Cossons and Wilding (in panel discussion, in Cossons [ed] 1985, p45) have realised early on, plural sources of funding pose challenges even when the total income realised is larger than could have been possible with a simpler income structure. Different accountabilities which the different moneys entail create pressure on museum management, and they require organisational and managerial capacity to cope with it. To some of the Nationals, this was in a sense already obvious in the early 1980s, when the formal divorce from central government departments was settled (eg V&A from the Department of Education and Science). The Nationals have recruited additional administrators, for example, dozens of development officers (eg fund-raising and sponsorship), and are reasonably prepared to play in what would be called a 'grantsmanship economy' in the United States. As we have seen in the case study, local authority museums in Britain do not have equivalent access to expertise, except for help with fundraising from the central service of the council; it is difficult for them to change in this respect.

Another implication relating to the impact of public policy on culture is more fundamental. I have questioned the adequacy of the policy itself, specifically the recommendation to cultural organisations of a strategic management model. I have pointed out the problems of the model in Chapter 6 and discussed them more extensively in Chapter 8. I should re-emphasise that the 'rational' model is useful as a starting point and was perhaps what museums needed some years ago. As far as the case-studied museums are concerned, however, their clever managers seem to have advanced beyond this model; therefore this model should no longer continue to be the one that is recommended as the most appropriate. The Rational Model, which has been endorsed in civil service as well as public services provision since 1979, has been repeatedly refuted by academic commentators for its over-simplicity (Pollitt [1990]) and for failing to acknowledge the nature of public service (eg Stewart and Walsh 1994).

So what help exists for museums at an advanced level of management? As Mason and Mitroff (1981) hold, the problems which many organisations—commercial or public—encounter today are hard to define, predict and identify; they are also inseparable from each other. In complex organisations where different functions are delegated to different groups of people, diverse values exist and people perceive the problems differently. For example, a drop in attendance figures at a museum may be seen as a serious problem by its marketing officer and the cause is perceived to be an insufficiency of promotional materials. It is not understood as a problem by a curator who wishes to see the gallery less congested. Another curator interprets this as the lack of focus on community service. Suppose that the second

curator is the best informed but the director only listens to the view of the marketing officer who can make a convincing argument, an increase in the printing budget may not solve the root problem. Often we struggle to solve a wrongly-defined problem.

Mason and Mitroff (1981) offer an approach to solving complex problems, termed Strategic Assumption Surfacing and Testing. This is based on the techniques of dialectics and argumentation, involving a broader participation of affected parties in the policy-making process, and confronting thorough reviews of relevant information completed by different groups. One of the hallmarks of this methodology is to stop a planning exercise from being conducted by a single, homogeneous party which devises policies based on wrong assumptions. By drawing in various departments and groups of people not directly relevant to the perceived problem area, decision-making is better informed. What I am suggesting here, in short, is that museums should have multiple approaches to management, each imbued with flexible and holistic views; they need to constantly expose different values and dilemmas which underlie problems and to synthesise them in a dialectic manner.

11.3 Paradoxes of Museum Management

Chapter 7 has identified problems in museum management as inherent dilemmas and paradoxes, which have been increasing, particularly for local authority museums, in recent years. As long as museums can stay happily immersed in the fetishism of collection, goals are crystal-clear; problems are bounded and likely to be a matter of resource allocation. The recent and yet long-overdue emphasis on the public service side, together with the advent of plural funding, has complicated matters, giving rise to a series of conflicts and paradoxes.

The above complexity does not exist only in museums but is prevalent in many organisations today. Cameron (1986) was one of the pioneers in organisation theory research who paid attention to the paradoxical nature of organisational effectiveness. He has noticed the tendency of organisations to possess incongruencies and incompatibilities simultaneously. This is why research which employs only one perspective to measure organisational effectiveness has been so confusing.

Cameron and others have been developing the concept of ‘paradox’—characterised as “the simultaneous presence of contradictory, even mutually exclusive elements”² (Cameron and Quinn 1988, p2)—as a useful metaphor for understanding organisation and management. This poses an unorthodox theory of a paradigm-shift nature, since most theories on organisation are limited by assumptions of its linearity and equilibrium (Cameron and Quinn [eds] 1988, p.xiii). Whether this fits well into mainstream organisation theory or not, the idea is worth introducing for our purpose: it seems to have some explanatory power for museum management, which I have characterised as being full of contradictions. I have mentioned these as ‘sources of problems’, but Cameron and Quinn’s idea is different and more encouraging than mine: “achieving perfect fit or congruence may lead to a tensionless state in which the system becomes static. Not all paradoxes need be resolved” (Cameron and Quinn 1988, p13). In other words, organisations with paradoxes will be, if they are dealt with appropriately, more effective and successful than those without. Thus, mastering contradictions is what is needed in today’s management for museums. Museums need to know how best to foster, deploy and marshall people’s creativity to make the most of their organisational capacity and work to the benefit of society. This must be done, while they deliver services on time, keep to tight budgets and meet regulations and statutory requirements.

The application of the above metaphor in management and leadership is presented by one of the above authors. It takes the form of an interesting book, written by Quinn (1988) in an accessible style and entitled ‘Beyond Rational Management’. Quinn approaches the concept of paradox in a positive way and suggests that mastering paradoxes is a necessary skill at an advanced level of management. This skill is also essential when an organisation which has already established a stable structure, formality and operational patterns is trying to move on after the initial evolving stage in its life-cycle. As the author asserts, administrative science tends to be incapable of dealing with dynamics and sees the organisation in a static way instead, so do most managers. In practice, however, contradictions in work become more salient, particularly at a senior level of management and in a mature organisation.

He argues for the importance of ‘masters of paradox’, who have “the capacity to see it [their work environment] as a complex, dynamic system that is constantly evolving” (p3). In order to respond positively to evolving challenges and anomalies, “they employ a variety of different perspectives of frames” (p3). Many managers may hang on to a ‘frame’—a set of

² This is still a slippery concept, and not all writers on the subject follow the same definition (Quinn and Cameron 1988, p290).

values and attitudes—which may have been useful in the past in their career or in organisational history, and fail to adopt another set which seems contradictory to the old one. Quinn argues this is how managers can become frustrated, confused and lost. Some would naturally acquire diverse, contradictory sets of values and philosophies and switch between them as appropriate in order to handle specific problems. Others would not. There are, thankfully, ways to master paradoxes in conscious ways, as Quinn shows in the book. Quinn and his colleagues have later developed this argument and emphasised that effective leadership must be able not only to recognise paradoxes, but also to respond in behavioural action to them (Denison et al 1995).

In this sense, as a matter of fact, directors of local authority museums must be well-qualified managers, since they have often had to deal with different types of collection. Through these experiences, they have probably learnt different attitudes and values. For example, the Wolverhampton and Walsall Museums, which are nationally said to be forward-looking and developmental organisations, are headed by former social history curators who are now enthusiastic about the potential of visual arts. In their early careers, they joined in the social history movement of the 1970s and counteracted the heritage tradition. They are now working with living artists and delivering contemporary or futuristic expressions of the artists. Through these they may have been liberated from conventions and assumptions associated with the heritage side of museums. The above pattern may not be ubiquitous. It is uncertain, furthermore, if museum directors with a science background, for example, are similarly open to other disciplines. My speculation is certainly debatable and remains open for further exploration.

The topic of the required qualities for leadership brings us to the issue of training. I have lacked sufficient space to discuss this despite its importance. I have only mentioned the lack of rigorous training, pre-entry and in-service, for curators. Curators are not provided with training in senior management either, which has been pointed out (MGC 1987) even prior to plural funding and the rising awareness of management in recent years. There is a big gap between a curator and a manager of curators; the latter is rather detached from day-to-day contact with objects and instead is engaged in enabling his or her staff to achieve curatorial projects collectively. In addition to such a role in nurturing creativity and establishing reputation, a manager in recent years needs to be informed about the health of the organisation and able to do something about it if it is unwell.

Despite the recognition of training needs, help is only slowly developing. The emergence of publications on aspects of museum management in the early-1990s signifies some progress. One difficulty of organising a management course for museum directors, short or long, derives from the diversity of the sector. The consequent diversity of training needs is evident particularly in relation to the different sizes of museums. A director of a small museum may be engaged in a whole variety of jobs (documentation, exhibition, education, fund-raising, financial management and marketing), which may be delegated to a number of different officers in a large museum. The diversity of the needs explains why arts administration and museum management courses at UK universities bifurcate into a strongly generalist approach on the one hand, which offers theoretical and intellectual education and transferable skills (eg reasoning), and a practically-based one on the other which aims to train junior administrators of the immediate future.

Short courses which offer a variety of options to choose from for senior curators and non-curatorial professionals at museums will help to a certain extent. In the meantime, however, many more fundamental issues need to be addressed. As I have explained in 7.3, Chapter 7, curator-dominated bureaucracy is being undermined by an increase in technocrats and technical-support staff. Will museums continue to be managed by ex-curators? Why are administrative directors not as widely-accepted as in performing arts organisations? Is it impossible for a museum to have, for example, a general manager and a cultural director? If the dual directorship is undesirable, does it have anything to do with museums' distinctiveness which need special consideration, or is it actually a matter of attitudes and vested interests? What will be the future of the existing jelly-like career structure? As usual, research gives rise to more questions than answers.

11.4 Consumerism and Beyond

I have discussed the marketing orientation and audience development activities emerging among local authority museums in Britain. An interesting point to note among the audience development projects is the extensive consultation with local people when preparing exhibitions, something most museums have never done before. Museums have tended to show what they believed to be of value, and the audience had to take it or leave it. This attitude had to change. Some museums have even encouraged ordinary people to participate in the creative part of museum events. The People's Show of Walsall is a typical example, and a more radical example is found in Glasgow with the Open Museum, where local

residents are allowed to borrow objects from the collection to mount their own exhibitions in their communities.

Impressive and interesting as these experiments may be, the question is how far museums will pursue this course. The relationship between a museum and its visitors used to be asymmetrical, in the sense that information utilised for the production of culture was virtually the monopoly of the museum. The museum took the lead, and visitors could follow if they wished. Once the museum starts to take visitors' views seriously, the information relationship is reversed. Consumers can claim they know better than the suppliers what *they think* is good quality, thereby jeopardising the superior position of the museum to specify what is appropriate to the public.

The Glasgow example has been deplored by some curators who worry about security and the condition of precious objects. As seen in this case, treading a fine line between professional ethics or the cultural leadership role of the museum, and publicly-oriented management is perhaps the most challenging of all the paradoxes museums have to manage. Even at Walsall, which is determined to devote itself to the community, two conflicts have been identified. One example is the START exhibition where young children interactively participated to enjoy works of art. The exhibition organiser felt it was not easy to let the boisterous public enjoy themselves while retaining respect for the objects. Another is related to its service to local artists. When it comes to the choice of artists to be represented in the gallery, quality comes first, which does not always place local artists in a favourable position. This is felt to be an issue for the community-oriented gallery.

In Chapter 9, I have presented a range of research issues for museums to be aware of in order to become more comprehensively responsive to consumer needs. What is most important, however, is that research results be put into practice (Hjorth 1993, p51). DiMaggio and Useem (1979) examined 25 performing arts organisations in the US to find out the degree to which results of audience studies were utilised and what factors affected the extent of use. They found the quality of research in technical terms was less influential on the use than the situational factors in which the research was conducted. For example, there was a tendency for arts managers and members of governing boards to listen to research results which met their preconceptions and expectations. Similar frustrations and concerns about evaluation were reported at a conference by delegates from different countries (Hilke [US] 1993; Hudson [UK] 1993; Klein [Germany] 1993; Van-Praët [France] 1993). It is clear therefore that research alone would not help.

The involvement in the organisation of exhibitions by the community in its widest sense has been referred to in the above. As we examine the issue of consumerism more closely, it becomes clear that not all values in public sector services—equity, equal opportunities, representation and participation (Pollitt 1988)—have been realised in all aspects of museum operation. Museums may have become more consumer-responsive, and even their programming has started to welcome the participation of citizens. Nonetheless, when it comes to management and governance, consumerism is yet to be found.

Local authority museums, as governed by local politicians, have public accountability to the local residents at least through the political representation, even if it may be largely tokenistic. User participation in governance is, however, rarely seen in museums regardless of ownership and size. Museum trustees are likely to be the Great and the Good, eminent scholars and benefactors of collections. Spalding (1993) points out that museums will not be a public service unless the current internal power structure—I interpret this as referring both to governing and executive bodies—is changed. Kavanagh's (1991, pp52-52) interest in knowing the profile of the current museums profession is related to this issue. Museology and museum culture theorists have analysed how the culture represented in museums reflects societal power relationships. They might also wish to see how museum's internal power and authority relationships are embedded into collection and exhibition. I am not proposing the recruitment of users' representatives to the board of trustees as an immediate panacea. It may or may not be the best way of bringing their views into museum management. It is, however, worth reminding ourselves of museum provision as a public service collectively consumed, not just as a bounded exchange relationship between service providers and customers in the market place.

Conclusion

The four issues raised in the last part of this paper would require multi-disciplinary research efforts to be developed, as would most research topics in cultural policy. Curiously, they are not necessarily specific to museums. The museum sector, thanks to its sectoral identity despite its internal diversity, has developed its own inter-disciplinary field of research which is constantly evolving. Creating an identifiable base of research is an advantage as it can reflect the distinctiveness of museums, some aspects of which I have discussed.

Nonetheless, a major disadvantage is that it compartmentalises itself and may make itself less

absorbent of useful ideas generated elsewhere. It is this conviction that prompted my reference to North American performing arts research in Chapter 9, while bearing in mind that some would complain about its irrelevance to the UK museum context. Students of museum studies, I believe, should not miss out on opportunities for cross-fertilisation in ideas, theories, concepts and methods in research wherever they come from, as long as they can reveal some enlightening ideas for them. If what I, as a generalist in cultural policy research, have attempted in this paper serves to be a stimulus in this respect, my best ambitions for the paper should be satisfied.

Appendix A

List of Interviewees

Organisation	Name	Title
Department of National Heritage	Patrick Fallon	Head, Museums Policy Branch
Museums and Galleries Commission	Jeremy Warren	Assistant Director
	Brian Loughbrough	Local Government Adviser
West Midlands Regional Museum Council	Jane Arthur	Assistant Director (Collections)
	Jenny Costigan	Assistant Director (Services)
Arts Council of England	Jeremy Theophilus	Senior Visual Arts Officer
West Midlands Arts	Caroline Foxhall	Director of Visual Arts, Crafts and Media
	Mark Dey	Visual Arts Officer
Birmingham Museum and Art Gallery	Graham Allen	Assistant Director (Museums & Arts), Department of Leisure and Community Services
	Michael Diamond	former Director, 1989-1995
	Dennis Farr	former Director, 1966-1988
	Bill Seaman	Head of Exhibitions and Museums Services
	Elizabeth Frostick	Head of Community Museums
	Jane Farrington	Principal Curator
	Evelyn Silber	former Head of the City Museum and Art Gallery
Stoke-on-Trent City Museum and Art Gallery	Ian Lawley	Assistant Director of Leisure and Cultural Services (Museum and Art Gallery)
Wolverhampton Art Gallery and Museum	Nick Dodd	Head of Arts and Museums
	Helen Large	Marketing Officer

	Pauline Thomas	Access and Education Officer
Walsall Museum and Art Gallery	Peter Jenkinson	Project Director, New Art Gallery Project (former director of the Museum and Art Gallery)
	Andrew Davis	Fundraising and Development Manager, New Art Gallery Project
	Sheila McGregor	Museum and Galleries Manager
	Deborah Robinson	Senior Exhibitions Officer
	Liz Wright	former Audience Development Officer
Museums Association	Mark Taylor	Director
Bretton Hall College	Simon Roodhouse	Professor
City University	Patrick Boylan	Professor
Marks and Spencer	Ron Sharp	secondee to WMAMS, retail specialist

Appendix B

Table 1.2 The Number of Museums in the UK, other than the National Museums

Year	Total	Local Authority Ownership	Source
1800	5	NA	Standing Commission on Museums and Galleries (1963)
1850	c50	NA	Standing Commission on Museums and Galleries (1963)
1900	200+	NA	Department of Education and Science (1973)
1914	350+	NA	Department of Education and Science (1973)
1920	424	148	Teather in Kavanagh (1994)
1928	530	267	Miers (1928)
1938	c800	c400	Markham (1938)
1963	876	c450	Standing Commission on Museums and Galleries (1963)
1973	c950	468	Department of Education and Science (1973)
1979	1000+	NA	Standing Commission on Museums and Galleries (1979)
1992	2000+	c800	MGC (1992)

NA : Not available

Appendix B

Table 2.1 Selected events and publications related to museum management and marketing, 1972-1997

Year	Notes	Event/Publication
1972	N	Museums and Galleries Admission Charge Act, to remove statutory impediments
1974	N	Admission charge introduced (January)
1974	N	Admission charge abolished (April)
1977		MA's code of practice for museum authorities issued
1982	N	Rayner Scrutiny of the Departmental Museums: Science Museum and V&A published
1982		House of Commons Select Committee Report 'Public and Private Funding of the Arts'
1984	N	The National Maritime Museum starts to charge, the 1st national museum to charge
1985	**	Seminar 'The Management of Change in Museums' held at the National Maritime Museums, London
1985	N	V&A voluntary admission charge starts
1987	*	OAL Arts Marketing Scheme starts
1987	N	The Natural History Museum starts to charge
1988/9	N	Shift from Parliament vote to grant-in-aid status Building maintenance responsibility from PSA to National Museums
1988	N	The Science Museum starts to charge
1988	**	The MGC Registration scheme starts
1988	N	Museums sponsored by the OAL obliged to submit a corporate plan to it
1988	*	MA Annual Conference 'Marketing the Museum'
1988	L	Local Government Act 1988 (CCT)
1988	N	MGC Report 'National Museums'

1988/9- 1991/2	*	OAL/MGC scheme for museum management and marketing
1989	N	The Imperial War Museum starts to charge
1990	N	House of Commons Select Committee Report 'Should Museums Charge?'
1990	*	Report 'Encouraging the Others' (Arts Marketing Scheme) published by OAL
1990	*	Gallery Marketing Symposium in Manchester, organised by ACGB
1991	*	'Marketing Museums and Art Galleries in Greater Manchester' Symposium Proceedings
1991		MGC 'Museums Matter' published
1991	**	MGC 'Forward Planning' published, HMSO
1991	L	Audit Commission 'Local Authorities, Entertainment and the Arts' HMSO
1991	L	Audit Commission 'The Road to Wigan Pier? Managing Local Authority Museums and Art Galleries' HMSO
1991	L	MGC 'Local Authorities and Museums' HMSO recommending museums to share marketing managers
1991	N **	OAL 'Report on the Development of PI s for the National Museums and Galleries' (Cooper & Lybrand)
1992	*	MGC Report 'Managing Development and Marketing in Museums'
1993	L	Positive Solutions 'Local Authorities' Management of Arts and Entertainment Facilities' for DNH
1993	N *	National Audit Office Report 'DNH, National Museums and Galleries; Quality of Service to the Public', HMSO
1994	N **	KPMG 'National Museums and Galleries PI s Steering Group'
1994	*	Runyard 'The Museum Marketing Handbook' published, HMSO
1994		National Lottery Funding starts
1995	L	DNH Guidelines for LA on Museums Services, following local government reorganisation
1995	L	'Arts Guidance for Local Authorities in England' for DNH by the national arts funding bodies
1995	N	DNH 'Corporate Planning Guidance for Museums and Galleries'

1996		DNH 'Treasures in Trust, A Review of Museum Policy'
1996	N	V&A starts compulsory charge
1997	*	McLean 'Marketing the Museum' Routledge
1997	**	Lord and Lord 'The Manual of Museum Management', HMSO
1997	**	Fopp 'Managing Museums and Galleries', Routledge

Notes: These are for indication only.

Symbols denote as follows.

N - matters concerning the National Museums and Galleries only.

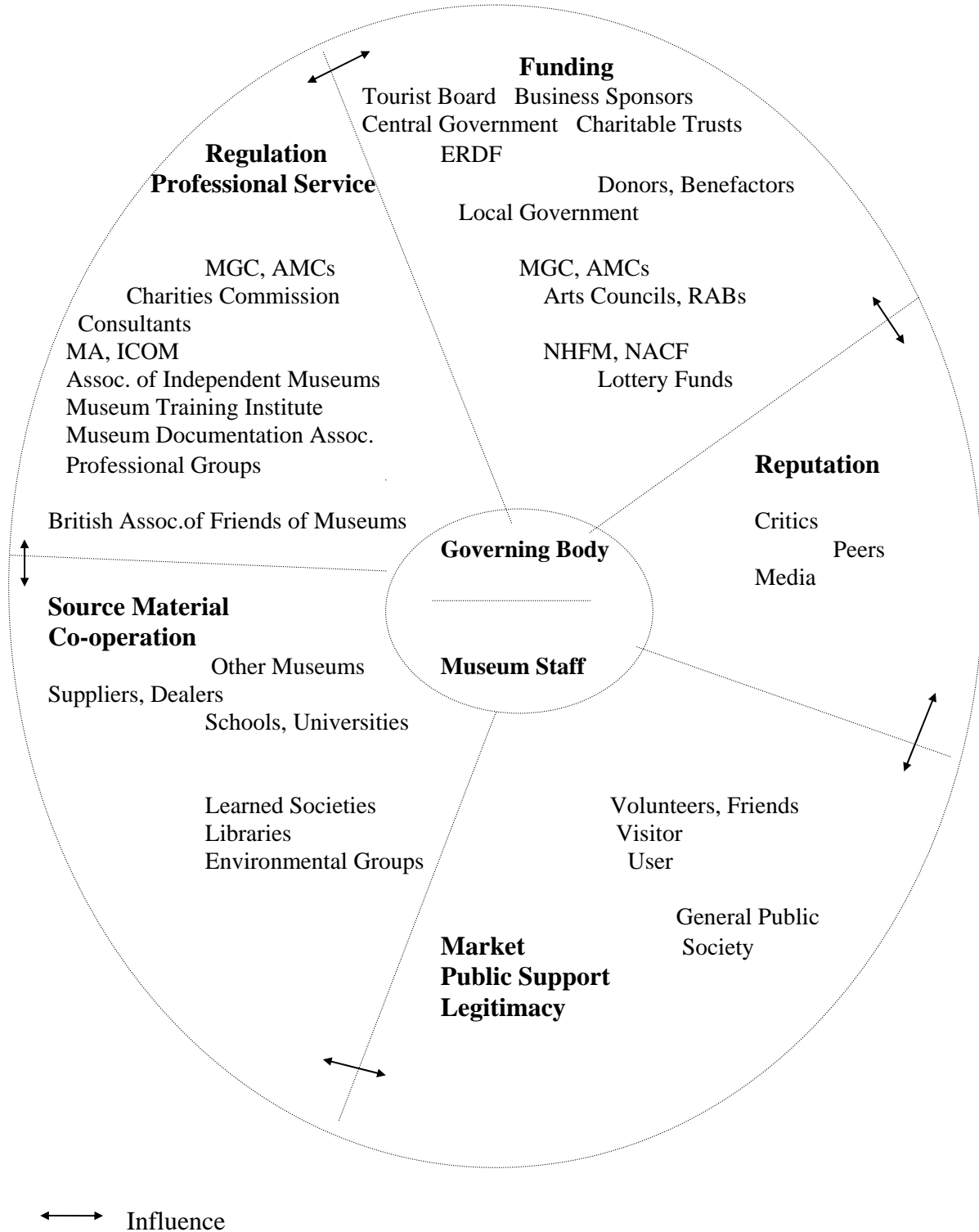
L - matters concerning local authorities (museums and arts) only.

* - events and publications on marketing

** - events and publications on management

Appendix C

Diagram 1: Museum and Multiple Constituencies



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